HR050

Business Processes in SAP ERP HCM

PARTICIPANT HANDBOOK
INSTRUCTOR-LED TRAINING

Course Version: 15
Course Duration: 5 Day(s)
Material Number: 50148638

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Typographic Conventions

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	
Demonstration	
Procedure	
Warning or Caution	
Hint	
Related or Additional Information	
Facilitated Discussion	
User interface control	*Example text*
Window title	*Example text*

Preparing for Your SAP Live Class

Required Equipment for Your SAP Live Class

- PC or Mac
- Integrated or external web cam
- Headset with integrated mic
- Stable internet connection

You can test if your setup is working correctly by using this link: https://sap.zoom.us/test

We recommend that you connect two monitors to your PC so that you can manage the course content more efficiently. This will reduce the need for you to switch (alt+tab) between the applications we use in class.

Getting the Most Out of Your SAP Live Class

- Make sure you have setup and thoroughly tested the SAP Live Class environment and resolved any issues well before the class begins. Refer to the separate instructions that you were sent for setup instructions and support contact information.
- Keep your web cam activated during the training sessions. You can switch it off during breaks if you prefer.
- Use a headset with an integrated mic to ensure a high-quality audio experience for both you and the other participants. Laptop speakers and mic produce poor quality sound and introduce background noise that can disturb the class.
- Make sure you are in a quiet area where you will not be disturbed.
- Be ready to use the mute feature to ensure any background noise does not disturb the class.
- Turn off email, phones, instant messaging tools, and clear other distractions away from your training area.
- Actively participate and prepare to be called on by name.
- Be patient waiting for a response to your chat messages.
- Always ask the instructor for assistance if you need help with an exercise. Don’t get left behind.
- Be ready to begin class on time so you do not delay the start of each session.
- During breaks, make sure you take the opportunity to get out of your chair and stretch.
- Please raise any concerns relating to the SAP Live Class experience with your instructor at the time they arise so that they can be quickly addressed.

Contents

Course Overview

TARGET AUDIENCE

This course is intended for the following audiences:

- Application Consultant
- Business Analyst
- Business Process Owner/Team Lead/Power User
- Data Consultant/Manager
- Help Desk/CoE Support

UNIT 1 SAP Human Capital Management Basics

UNIT OBJECTIVES

- Log on to an SAP system
- Personalize the SAP interface
- Navigate in the SAP system
- Find Information using the system status bar
- Access the SAP system using role based menus
- Open multiple sessions in the SAP system
- Find help from the SAP Easy Access screen

Unit 1
Lesson 1

Logging On to the SAP System

LESSON OVERVIEW

This lesson shows you how to log on to the SAP system and personalize the user interface.

Business Example

You are new to the company and to execute your responsibilities, you must be able to log on to the SAP system and personalize the display of your screens. For this reason, you require the following knowledge:

- How to log on to the SAP system
- How to personalize your screens

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Log on to an SAP system
- Personalize the SAP interface

Logon Process

Logon process ERP logon process The system administrator provides a user ID and initial password to enable you to log on. During the initial logon process, you are prompted to create a new password, one that you alone know. Your personal password is used for future log ons.

> Note:
> These procedures may differ somewhat at your company. For more information, contact your system administrator.

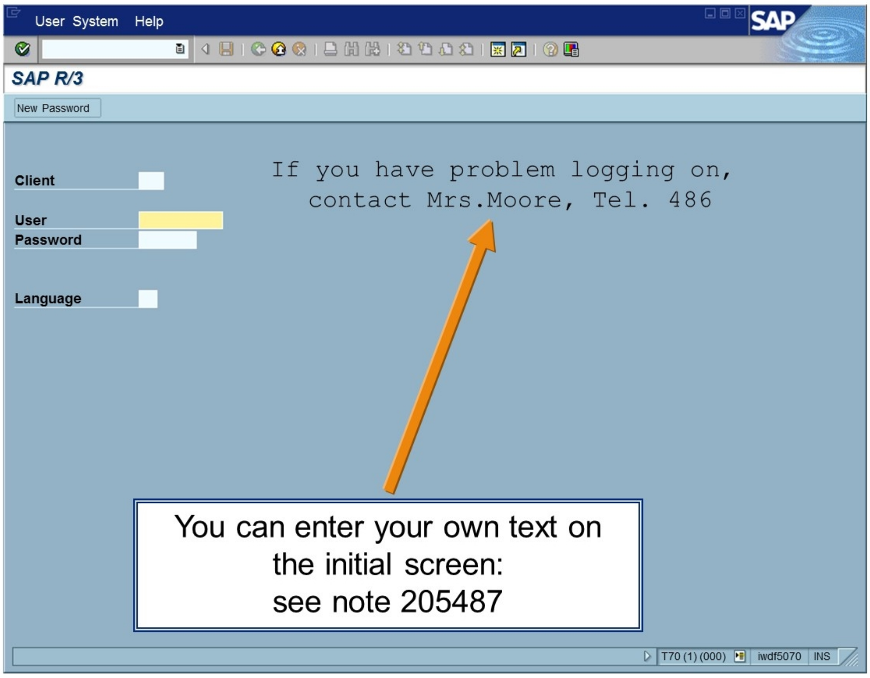

Figure 1: Logging on to an SAP System

The SAP logon icon is one of the items found in the start menu of your desktop. You or the system administrator my also set up a short-cut icon on your desktop to facilitate the log on process. Logging on to an SAP system requires input in various fields.

The SAP log on screen includes the following elements:

Client:

- SAP systems are client systems.
- The client concept enables the parallel operation, in one system, of several enterprises that are independent of each other in business terms.
- A client is, in organizational terms, an independent unit in the system.
- Each client has its own data environment and therefore its own master data, transaction data, and assigned user master records.

User:

- To log on to the system, a master record must exist in the system for that user.
- The master record must refer to the relevant client.
- The assigned user ID is unique to the specific individual.

Password:

- To protect access, a password is required to log on.
- Each user creates their own personal password.
- The password is hidden with a field of asterisks.

Language:

- The language field is an optional entry.
- If left blank, the system will load with the default system language.

For security and licensing reasons, multiple logons are logged in the system. A warning message appears if the same user attempts to log on more than once.

Interface Personalization

Figure 2: General Screen Layout

The system administrator can include an image, for example your company logo, on the right-hand side of the screen. This image can only be entered system-wide and is a cross-client setting.

Individual users can personalize their user interface and prevent this image being called by switching it off. From the main menu bar, choose *Extras* → *Settings* → *Do not display screen.*

Easy Access menu

Favorites

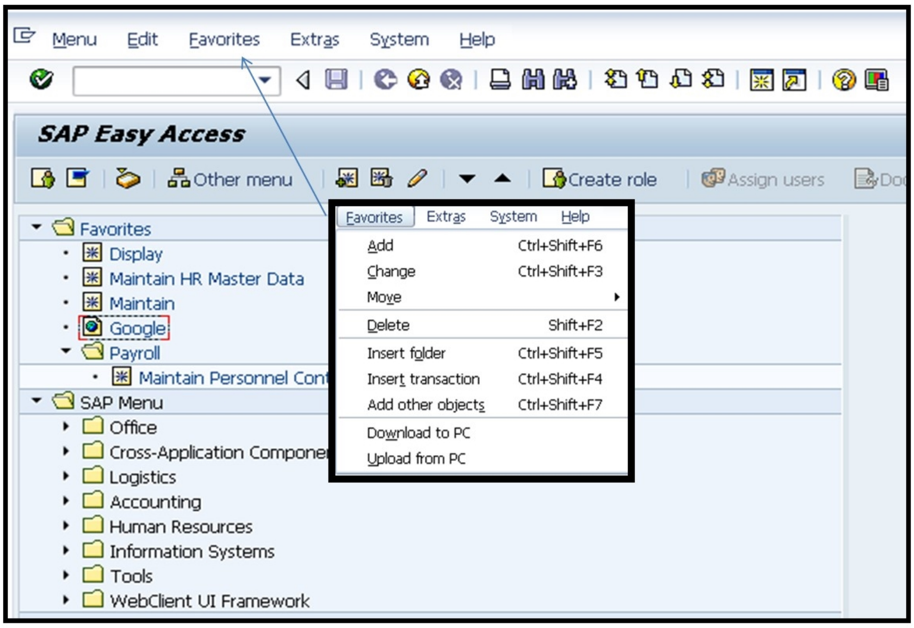

Figure 3: Favorites

>ERP System navigation tree You can create a favorites list of frequently used transactions.

A favorites list can include the following:

- Transaction code
- Files
- Web Addresses
- Folders which can include transaction codes, files, Web addresses

You can add transactions to your favorites folder in multiple ways.

Transactions can be added to favorites in the following ways:

Method	Steps
Drag and Drop	• Locate the desired transaction in the SAP Easy Access tree. • Left click and hold. • Drag and drop it onto the favorites folder.
Highlight	• In the SAP Easy Access tree, locate and highlight the desired favorite. • On the main menu bar, select Favorites. • Choose Add to Favorites.
Transaction Code Known	• On the main menu bar, select Favorites.

Method	Steps
	• Choose Insert Transaction. • Enter the transaction code in the dialog box.
Add a URL	• On the main menu bar, select Favorites. • Choose Add Other Objects. • From the dialog box presented, select Web Address or File • Choose continue. • In the first line of the dialog box presented, enter the name of the URL you would like to see in your favorites list. • On the second line, enter the URL address. • Select enter to continue.
Add a Folder	• On the main menu bar, select Favorites. • Choose Insert Folder. • Give the folder a name. • Select continue. • You may add individual transaction codes or urls to this folder as well.

LESSON SUMMARY

You should now be able to:

- Log on to an SAP system
- Personalize the SAP interface

Navigating SAP Menus

LESSON OVERVIEW

This lesson shows you how to navigate in the SAP system.

Business Example

You are new to your organization and are required to work in the SAP system daily. For this reason, you require the following knowledge:

- How to navigate in the SAP system

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Navigate in the SAP system
- Find Information using the system status bar
- Access the SAP system using role based menus
- Open multiple sessions in the SAP system

Navigation Tree

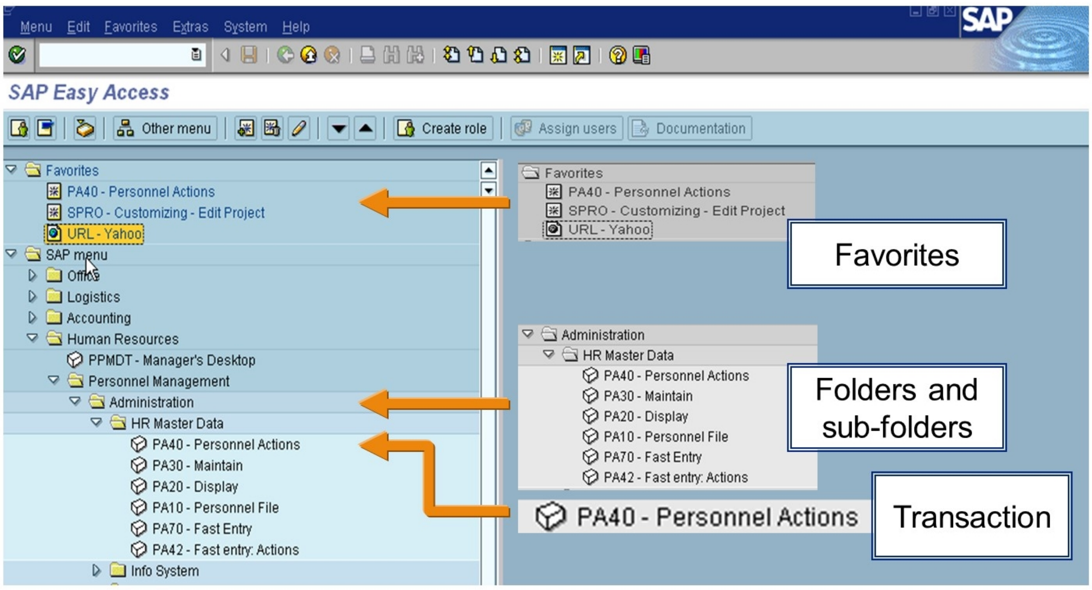

Figure 4: Navigation Tree

The SAP Easy Access screen is the standard entry screen in the system which includes a compact tree structure.

Every function has a transaction code which you can access from any screen. You can find the transaction code for the function you are working in at the moment by choosing *System* on the status bar or by choosing *Status* under the *System* menu option.

You can call system functions via the tree structure, through your favorites or by entering the transaction code in the command field. You can activate the display of transaction codes in the menu tree by navigating as follows: From the main menu bar, choose *Extras > Settings > Display Technical Names.* When you reopen the folders to the transaction code level, the transaction code is displayed.

Command Field Shortcuts

The command field is used to call a specific transaction or function.

Selected command field short cuts include the following:

Entry in the Command Field	Result
/n	Ends the current transaction
/o	Provides an overview of sessions
/i	Ends the current session
/oXXXX	Where XXXX is a transaction code: takes you to the specified transaction code - for example: /opa30 opens a new session at the transaction code pa30 - Maintain HR Master Data.
search_sap_menu	Search for and display the menu paths for SAP transactions. You can also search for text strings.
/nend	Log off with an unsaved message dialog box presented
/nex	Exits the system (logs off completely); No dialog box regarding unsaved data is presented.

Screen Elements

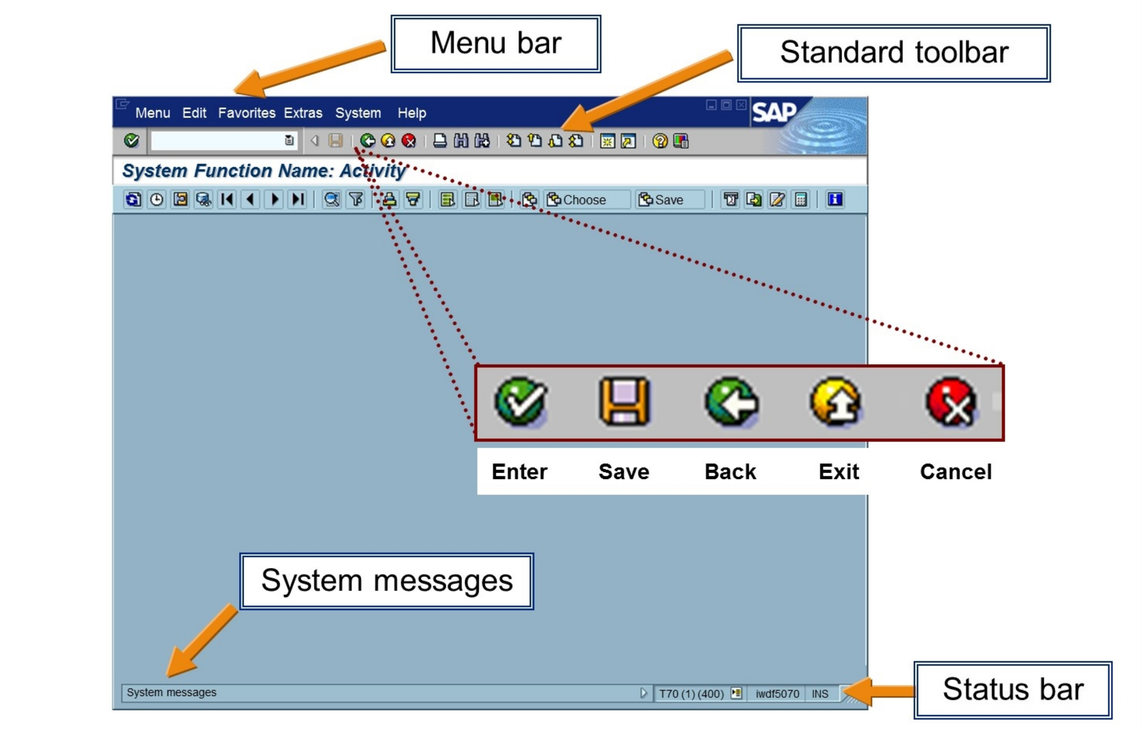

Figure 5: Screen Elements

The menus displayed depend on the application you are working in. These menus contain cascading menu options. The icons in the standard toolbar are available on all SAP screens. Icons you cannot use on a particular screen are grayed out. If you hover over an icon, a Tooltip appears with the name or function of that icon and the corresponding function key settings. The title bar displays the function that is available. The application toolbar displays available icons.

Status Bar

Status Bar:

The status bar provides general information on the SAP system and transaction or task you are working on, including warnings and errors. System messages display on the left side of the status bar. The right side of the status bar contains fields containing server and system status information.

The right side of the status bar includes the following information:

- System
- Client
- User
- Program
- Transaction
- System Response Time

- Server you are connected to
- Data Entry Mode (choose this field to switch between Insert (INS) and Overwrite (OVR) modes.

> Note:
> To hide the status fields, choose the arrow to the left; to display the status fields, choose the arrow to the right.

Role-Based Menus

role-based menus ERP role-based menus roles ERP roles Roles are collections of activities used in business scenarios.

A user assigned a role generated through the profile generator, is assigned the menu displayed on the SAP Easy Access screen including the authorizations required to access the information. This ensures that the business data is always secure. Authorization profiles are generated according to the activities contained in the role. A user can be assigned multiple roles.

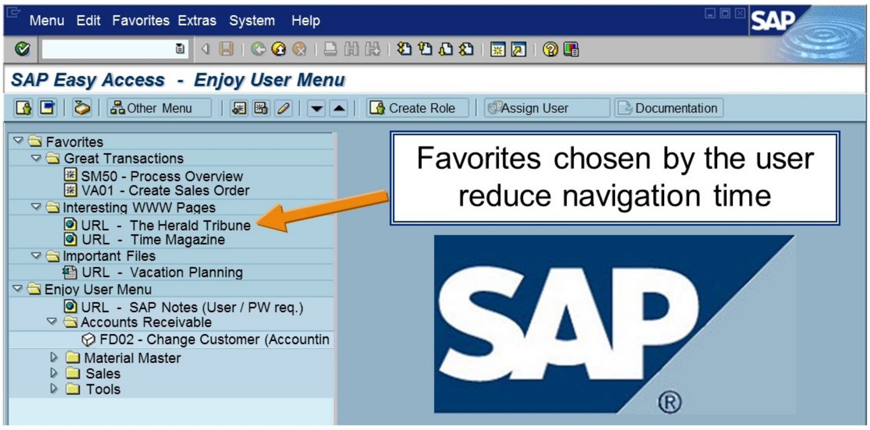

Figure 6: Role-Based Menus

A role-based menu contains the activities that the user can execute based on the role assigned to the user in the system.

The system administrator can tailor the user menu to the personal requirements of each user by adding or deleting menu entries.

Users access the transactions, reports, or Web-based applications through user menus. SAP delivers predefined roles. Users can change aspects of roles they are assigned, for example, by creating their own favorites list.

> Note:
> The roles you are assigned to also define your system access authorizations. The system checks your assigned authorization rights on all transactions to determine if you are allowed to execute the transaction. The system also analyses which activities you are allowed to perform and what information you can access.

Multiple Sessions

You can create up to six independent sessions per log on. Each session you create is as if you logged on to the system again. For example, closing the first session does not cause the other sessions to close.

Too many open sessions can result in slower system performance. For this reason, your system administrator may limit the number of sessions you can create to fewer than six.

As long as you remain logged on to the SAP system, you can leave a session for as long as you like and resume working on the session at any time. You can move among sessions as often as you like without losing any data.

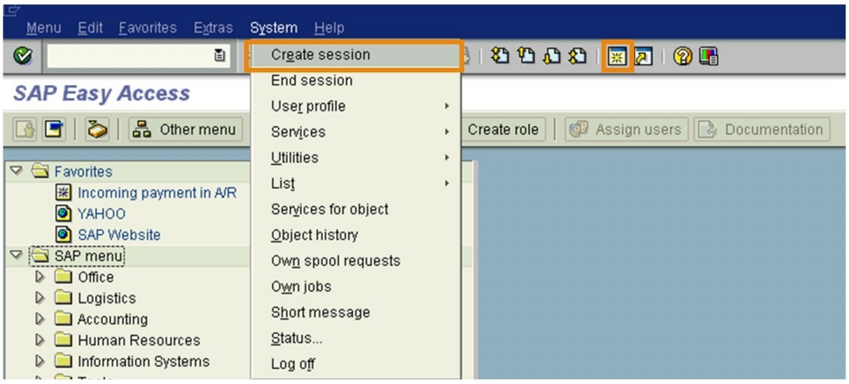

Figure 7: Multiple Sessions

To move from one session to another, click any part of the window that contains the session you want to go to. The window you choose becomes the active window and It moves in front of all other windows on your screen.

If you have several sessions open, you can minimize the sessions you are not using. When you need to use one of these sessions later, you can restore it by clicking the appropriate symbol in the status bar, making it the active session. By minimizing the sessions you are not using, you can significantly reduce the system load.

After you finish using a session, it is a good idea to end it. Each session uses system resources that can affect how fast the system responds to your requests. Before you end a session, save any data you want to keep. When you end a session, the system does not prompt you to save your data.

To create multiple sessions using the standard toolbar, select the Creates New Session icon. Alternatively, you can create multiple sessions by choosing *System* → *Create Session*.

LESSON SUMMARY

You should now be able to:

- Navigate in the SAP system
- Find Information using the system status bar
- Access the SAP system using role based menus
- Open multiple sessions in the SAP system

Finding Help

LESSON OVERVIEW

This lesson shows you how to find help from the SAP Easy Access screen.

Business Example

As a new SAP user, you need to efficiently use the system. For this reason, you reuqire the following knowledge:

- How to fnd system-level help
- How to find field level help

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Find help from the SAP Easy Access screen

System Help Options

The SAP system provides comprehensive online help available from any screen in the system. You can find help using the Help menu or using the relevant icon.

The help menu contains the following options:

Application Help:
: Application help displays comprehensive help on the current application. For example, selecting this menu option in the initial screen displays help on getting started with the SAP system.

SAP Library:
: The SAP library contains all online documentation.

Glossary:
: The glossary enables you to search for definitions of terms.

Release Notes:
: Release notes enable you to read about functional changes that occur between SAP releases.

SAP Service Marketplace:
: The SAP Service Marketplace also offers fast and user-friendly access to the SAP library. The SAP Service Marketplace is a Web site for customers to conduct research and post problems/solutions, review release notes, and so on.

Create Support Message:
: The create support message selection enables you to send a message to the SAP Service system.

Settings:

The settings option enables you to select settings for help.

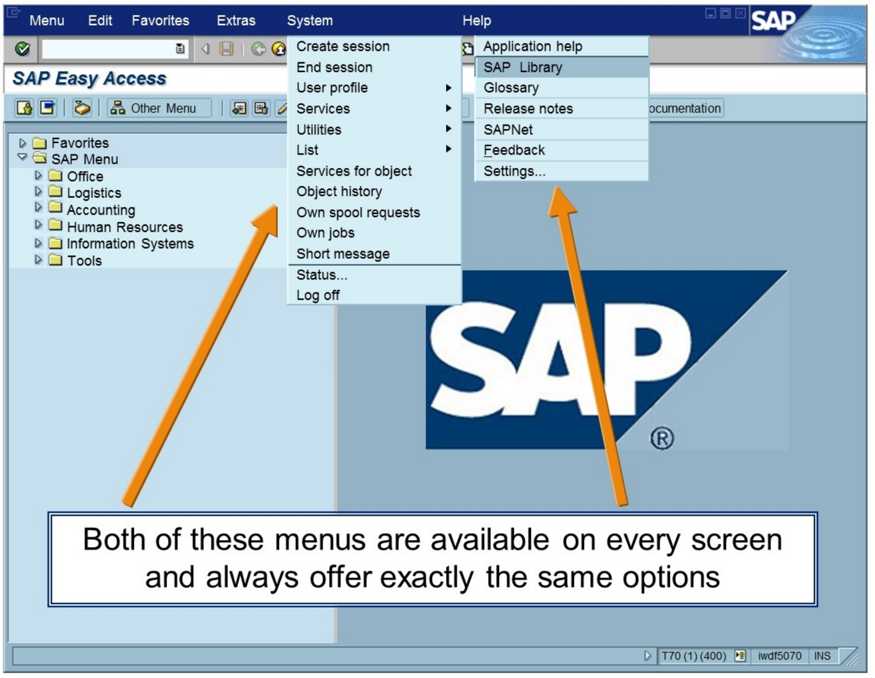

Figure 8: Find Help

To find the definition of a specific field, place your cursor on the field and select F1 (this is called F1 help). A dialog box is presented which describes that field. F1 help also provides technical information on the relevant field. This includes, for example, the parameter ID, which you can use to assign values to the field for your user.

To view the permissible values for a field, select F4 (this is called F4 help). You can also access F4 help for a specific field by selecting the button immediately to the right of that field.

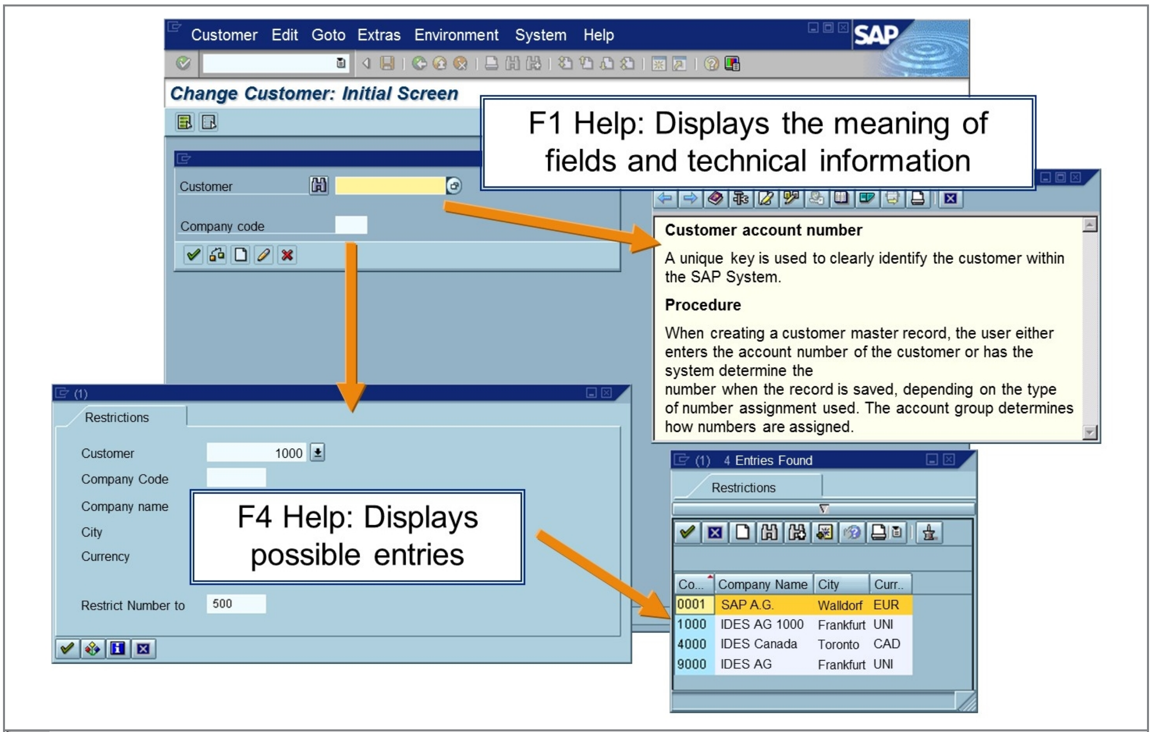

Figure 9: Field Help - Using F1 and F4

LESSON SUMMARY

You should now be able to:

- Find help from the SAP Easy Access screen

Learning Assessment

1. Which of the following are required to log on to the SAP system?

   Choose the correct answers.

   - [ ] A A specific client
   - [ ] B Your user ID
   - [ ] C Your password
   - [ ] D Your personal settings

2. In the SAP Easy Access menu, you can create a Favorites list containing:

   Choose the correct answers.

   - [ ] A Web addresses
   - [ ] B Transactions
   - [ ] C Files

3. You can have only one SAP system session open at a time.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. List three different types of online help that are available in the SAP system.

   ____

   ____

   ____

Learning Assessment - Answers

1. Which of the following are required to log on to the SAP system?

   Choose the correct answers.

   - [X] A A specific client
   - [X] B Your user ID
   - [X] C Your password
   - [ ] D Your personal settings

   Correct. You do not customize your settings until you are already logged on the SAP system.

2. In the SAP Easy Access menu, you can create a Favorites list containing:

   Choose the correct answers.

   - [X] A Web addresses
   - [X] B Transactions
   - [X] C Files

   Correct. Favorites can consist of Web links or URLs, standard and customer transaction codes, and links to other files such as Microsoft Word documents or PowerPoint files.

3. You can have only one SAP system session open at a time.

   Determine whether this statement is true or false.

   - [ ] True
   - [X] False

   Correct. You can create up to six sessions. Each session you create is as if you logged on to the system again. Each session is independent of the others.

4. List three different types of online help that are available in the SAP system.

Application help, SAP Library, and Glossary are different types on online help available in the SAP system. Field level (F1) help, Release Notes, and SAP Service Marketplace are also available. Application help is screen level help. The SAP Library contains all online documentation. The Glossary defines key words. Field level help provides information on a specific field, the release notes document differences between releases, and SAP Service Marketplace is also available to search for documentation.

UNIT 2 Structures in Human Capital Management

UNIT OBJECTIVES

- Identify the elements of Human Capital Management structures
- Analyze the elements of the enterprise structure
- Display the elements of the HCM personnel structure
- Identify objects included in an organizational plan
- Update Human Capital Management structures with the Organization and Staffing Interface
- Execute a report on existing positions

Unit 2
Lesson 1

Analyzing HCM Structures

LESSON OVERVIEW
This lesson shows you how to analyze HCM structures.

Business Example

You are responsible for the configuration of the Human Capital Management structures. For this reason you require the following knowledge:

- A good understanding of the enterprise structure
- A good understanding of the personnel structure

LESSON OBJECTIVES
After completing this lesson, you will be able to:

- Identify the elements of Human Capital Management structures
- Analyze the elements of the enterprise structure
- Display the elements of the HCM personnel structure

Human Capital Management Structures

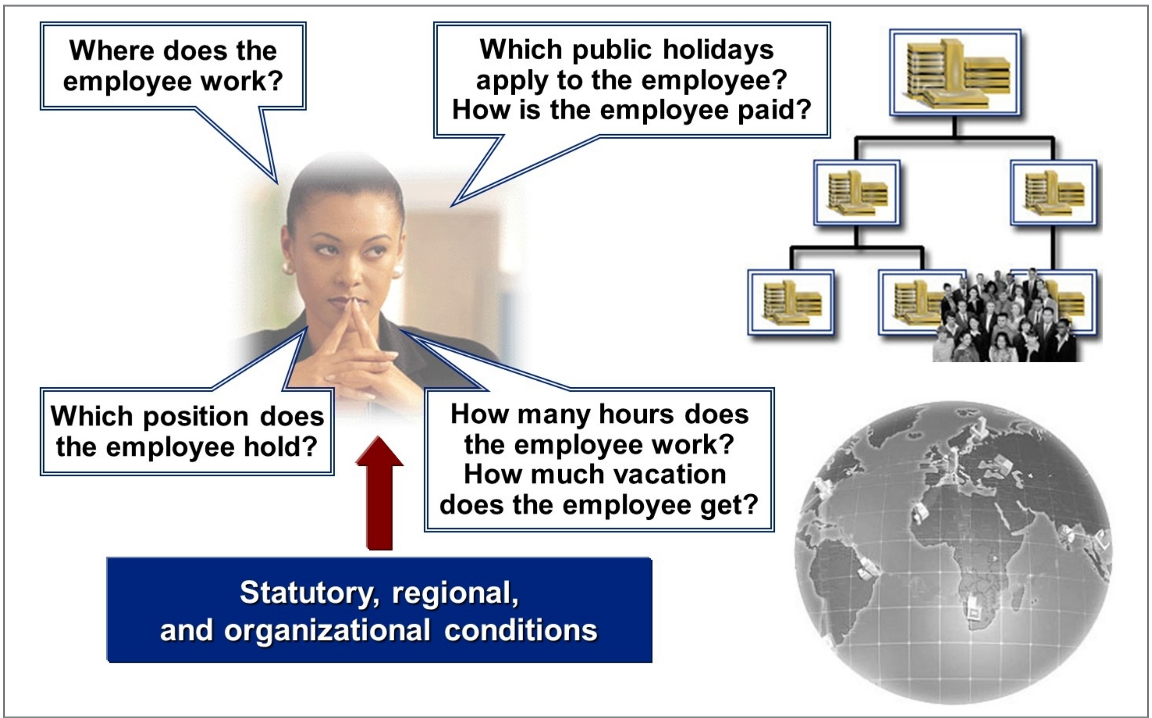

Figure 10: Employees

SAP Human Capital Management includes structures in which organizational hierarchies and employee relationships are set up and stored. Employee data is administered within these structures and you can evaluate and report on employee data for all enterprise-specific organizational aspects.

The structures are subdivided into organizational structures based on an organizational plan, and administrative structures that are based on the enterprise and personnel structures. Every employee is included in the structure of the enterprise.

The structures are as follows:

Organizational Plan:

- The organizational plan is the foundation of organizational management.
- Provides a complete model of the structural and personnel environment of your company.
- Hierarchies and reporting structures are clearly laid out.
- The organizational plan uses elements called objects.

Administrative structures:

- Administrative structures include the enterprise and personnel structures.
- The enterprise and personnel structures subdivide organizations and employees according to factors relevant for time management and payroll.

Information on the organizational assignment of employees is of great importance for authorization checks, the entry of additional data, and for time management and payroll accounting.

Organizational, Enterprise, and Personnel Structure

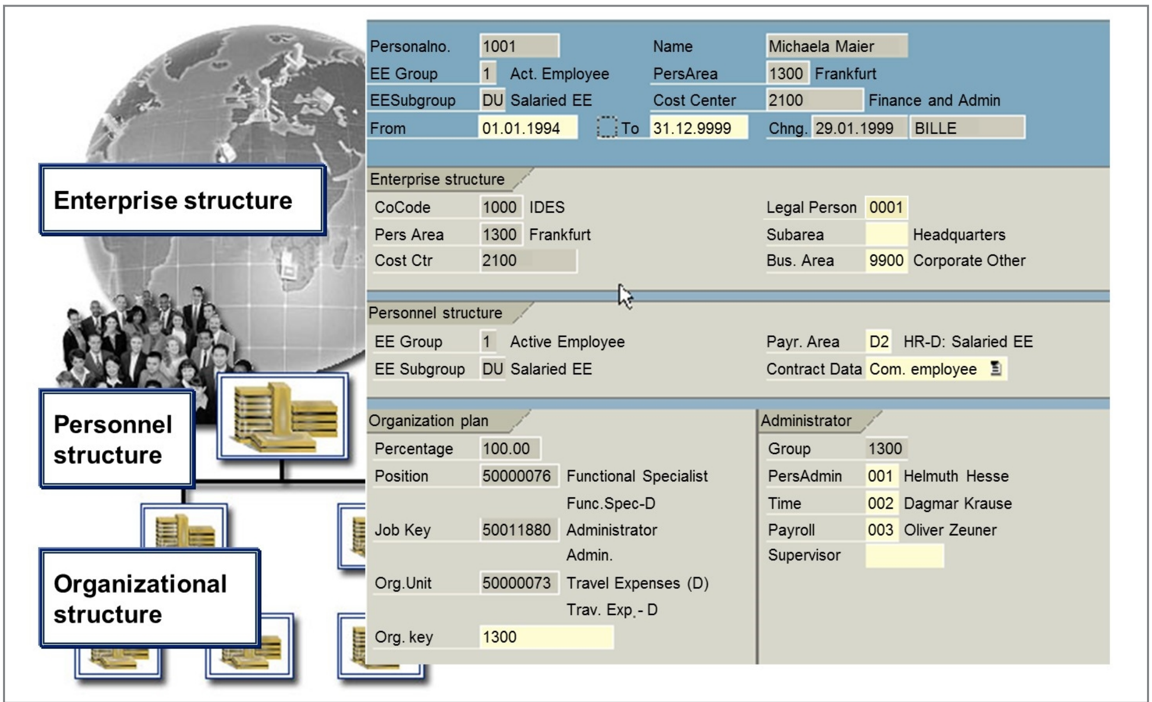

Figure 11: Organizational, Enterprise, and Personnel Structure

The allocation of employees to the structures in their enterprise is the first step in entering personal data.

Employees are assigned to the structures on the Organizational Assignment Infotype 0001 which, includes them in the enterprise, personnel, and organizational structures.

The Organizational Assignment infotype includes assigning employees to the following elements in the Enterprise Structure:

- Company Code
- Personnel Area
- Personnel Subarea

Enterprise Structure

The enterprise structure for personnel administration includes 4 levels, none of which may be skipped, nor can additional levels be added.

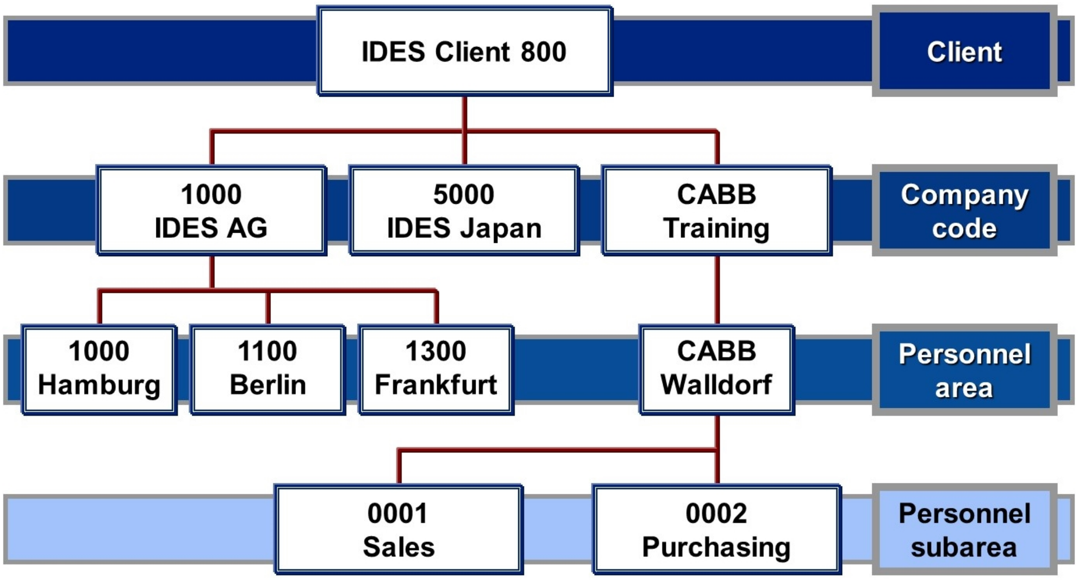

Figure 12: Enterprise Structure: Example

The enterprise structure for personnel administration includes the following elements:

Client:

- A client can either be valid for a company code at the smallest level, or for the entire corporate group.
- Data is stored within a client.
- There is usually no data exchange between clients.
- If an employee changes clients, you have to re-create the personnel number in the new client.

Company Code:

- The company code is the highest level of the company structure.

- The company code is a self-contained unit in legal terms, for which you can draw up a complete set of accounts.
- Company codes are created in Financial Accounting.
- You can have one or more company codes within a client.
- Legally required financial statements such as balance sheets and profit and loss statements are created at the company code level.
- A company code is used within the enterprise structure.
- Currency is stored at the company code level and is relevant for Human Capital Management.

Personnel Area:

- The personnel area is used exclusively in Personnel Administration and is unique within a client.
- Each personnel area must be assigned to a company code.
- Personnel areas are very important for selecting data.
- Personnel areas are important for authorizations.
- Personnel areas are used for creating defaults in infotypes.

Personnel Subarea:

- The personnel subarea includes groupings which specify the entries from subsequent settings that can be used for employees assigned to a particular company code or personnel area. These groupings directly or indirectly affect time management and payroll.
- Personnel subareas are subdivisions of personnel areas.
- Personnel subareas are used for selecting data for reporting.
- Personnel subareas are used for creating defaults for infotypes.
- Keys stored in the personnel subarea control pay and working time (for example: bonus payments or work schedules - which may be valid in one personnel subarea but not another).

The client is an independent legal and organizational unit of the system (group, for example).

The company code is an independent company with its own accounting unit; a company that draws up its own balance sheets.

A personnel area is an organizational unit in Personnel Administration. It represents a subdivision of the company code.

Personnel subareas are subdivisions of personnel areas. Work rules driven by this structure are assigned at the subarea level.

Figure 13: Definitions

Personnel Structure

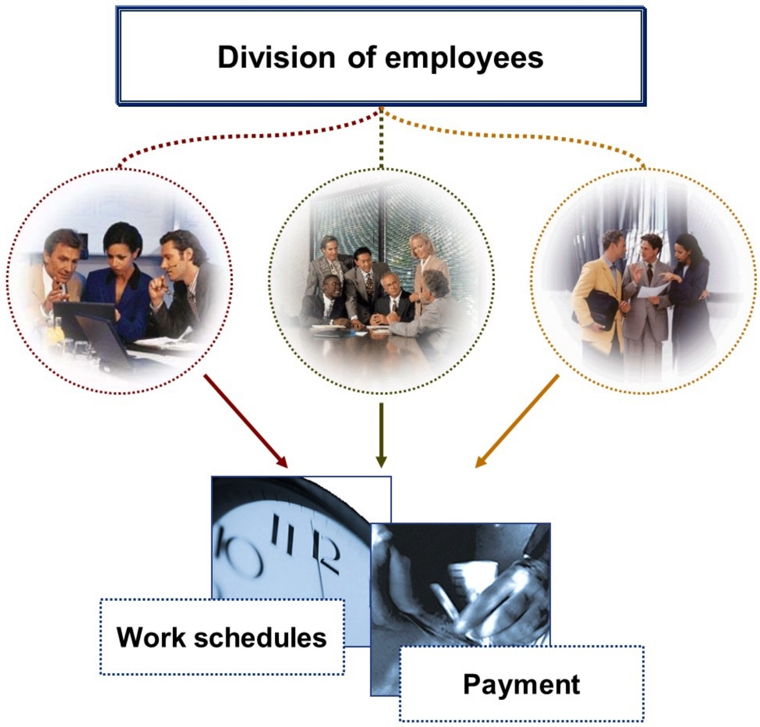

Figure 14: Personnel Structure

The personnel structure includes all employees and various groupings of employees. To enable different working time and employee remuneration in payroll, a distinction must be made between employees.

Employee Group

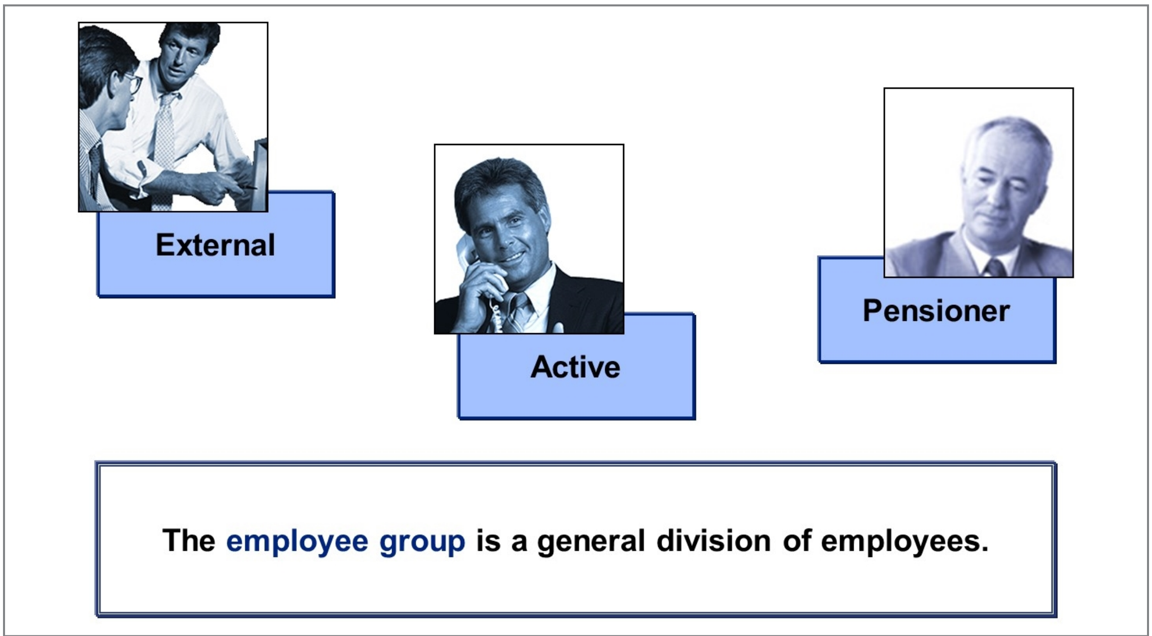

Figure 15: Employee Group

Employees are divided into two levels, an employee group and an employee subgroup. Authorization checks are run on these groups to identify items such as remuneration levels or different work schedules.

The employee group is a general division of employees and defines the relationship between an employee and the company. Examples of employee groups include employees, pensioners, and early retirees.

The principal functions of the employee group are as follows:

- Default values can be generated for the payroll accounting area. For example, basic pay can be defaulted based on an employee group.
- The employee group is used a a selection criterion for reporting.
- The employee group is one unit of the authorization check.

A standard catalog of employee groups is delivered and you can extend the selections to meet your business requirements.

Employee Subgroup

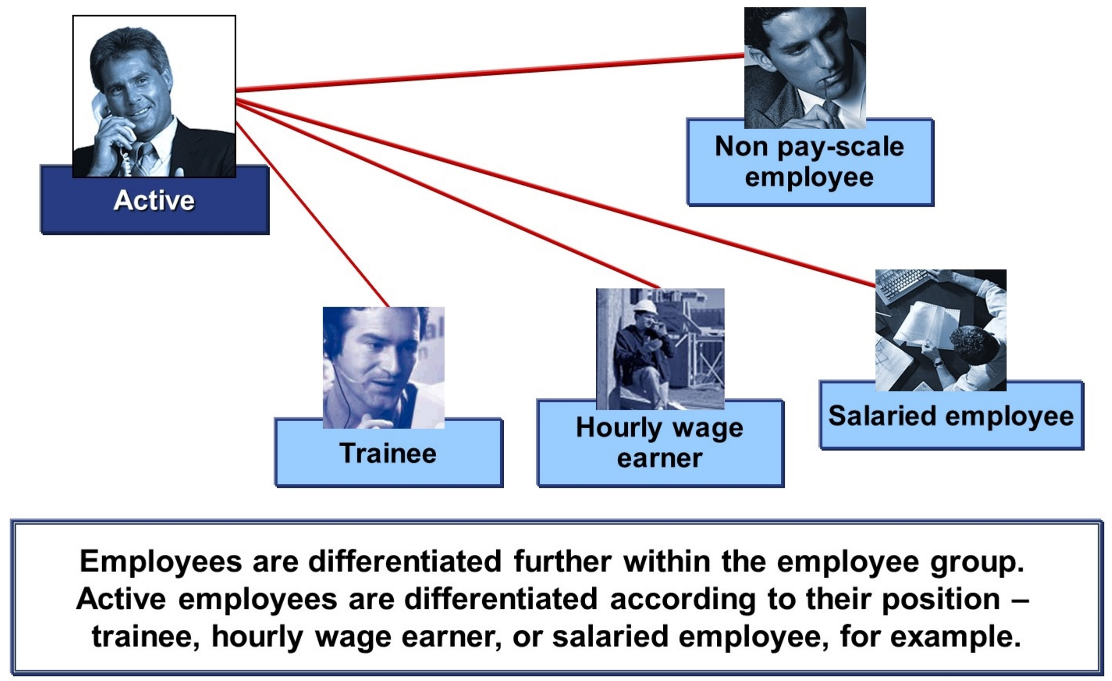

Figure 16: Employee Subgroup

The employee subgroup further defines employee groups according to the position of employees. Wage earners, salaried employees, and non-pay scale employees are all examples of subgroups within the employee group. The employee subgroup can be used to define default payroll accounting areas.

All control features of the personnel structure are defined at employee subgroup level.

Examples of control features of the personnel structure are as follows:

Control Feature: Employee Subgroup Grouping for the:	Purpose
Personnel Calculation Rule	• define different payroll procedures for different employee subgroups - for example: specify whether an employee's pay should be accounted on an hourly or pay period amount basis
Primary Wage Types	• controls the validity of wage types on an employee subgroup level
Collective Agreement Provision	• restricts the validity of pay scale groups to certain employee subgroup groupings

Payroll Area

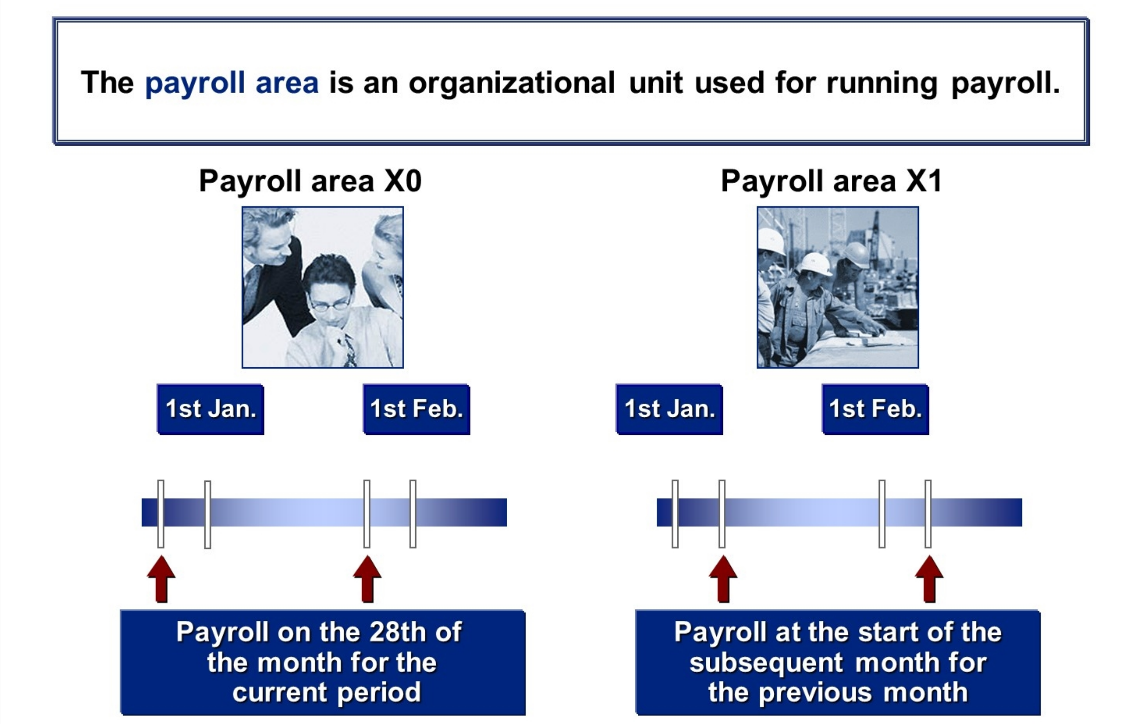

Figure 17: Payroll Accounting Areas

The personnel structure also includes the payroll area which represents an organizational unit used for running payroll. Employees who have payroll run for them at the same time, for the same period of time, are assigned to the same payroll area.

Payroll accounting is generally performed for each payroll accounting area. The payroll accounting area provides the payroll driver with the employees to be accounted and the dates of the payroll period.

The employees with the same payroll accounting area on the organizational assignment infotype will be processed together for payroll.

Hint:
An employee may only change payroll accounting areas at the end of a period. If an employee changes status from wage earner to salaried employee in the middle of the pay period, and the payroll area is different for both, you should not enter the new payroll area until the start of the following month.

LESSON SUMMARY

You should now be able to:

- Identify the elements of Human Capital Management structures
- Analyze the elements of the enterprise structure
- Display the elements of the HCM personnel structure

Unit 2
Lesson 2

Enhancing the Organizational Structure

LESSON OVERVIEW

In this lesson, you will learn how to set up and maintain an organizational structure.

Business Example

As the Organizational Management Specialist for your organization, you are responsible for creating, maintaining, and updating the organizational structure. For this reason you require the following knowledge:

- A solid understanding of the organizational structure
- A good understanding of how to create organizational objects

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify objects included in an organizational plan

Organizational Plan

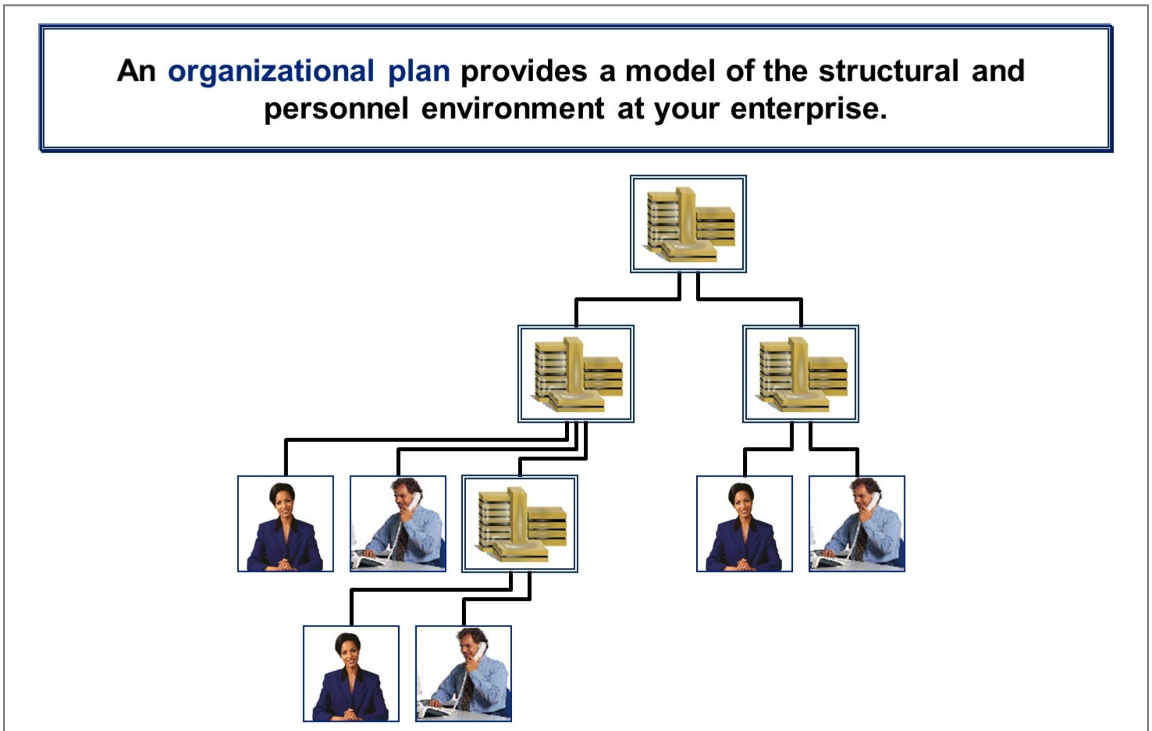

Figure 18: Organizational Plan

Organizational management includes various objects which are used to create the structure of your company. An organizational plan is a comprehensive model of the structural and personnel environment of your company and is created using organizational units and positions.

Hierarchies within your organizational plan set up your organizational structure. The organizational structure depicts the hierarchy that exists between the various organizational units in your company. The organizational structure is created by relating organizational units to one another.

Activities to create an organizational plan include the following:

- Create root organizational unit
- Create subordinate organizational units
- Create jobs
- Create positions
- Assign cost centers
- Assign persons
- Maintain other object attributes

The order of these steps is not fixed.

Organizational Units

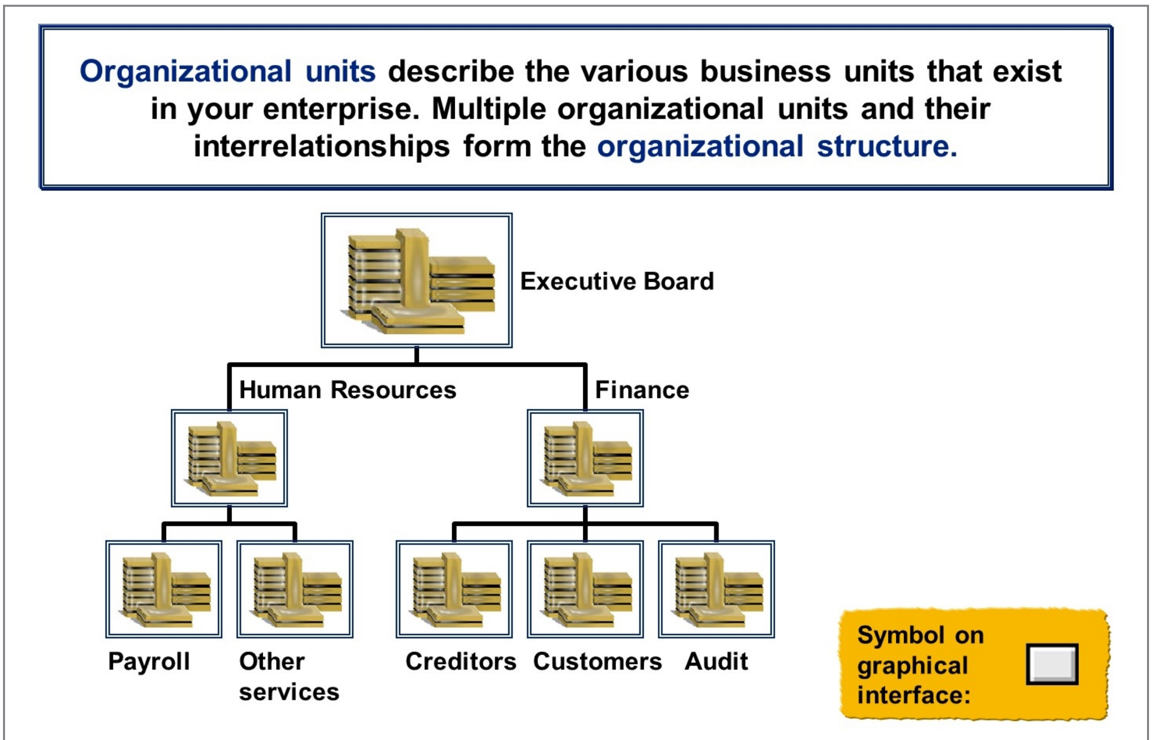

Figure 19: Object Types: Organizational Units

Organizational units describe the various business units that exist in your company. Organizational units can be classified generally (for example by function or by region), or specifically (for example by project group). Multiple organizational units are related with one another in an organizational plan and their relationships form the organizational structure.

Organizational units can be linked to cost centers from accounting. This example illustrates the organizational unit of Executive Board as the superior object over two subordinate organizational units, Human Resources and Finance.

Organizational units include positions which form the reporting structure (chain of command). An organization chart maps the structure in your company and your create a reporting structure by creating and maintaining positions and relating these to one another.

The hierarchical interrelationships that exist between the organizational units represents the organizational structure of your enterprise.

The example shows the organizational unit Executive Board as the superior object over two subordinate objects, Human Resources and Finance.

Jobs

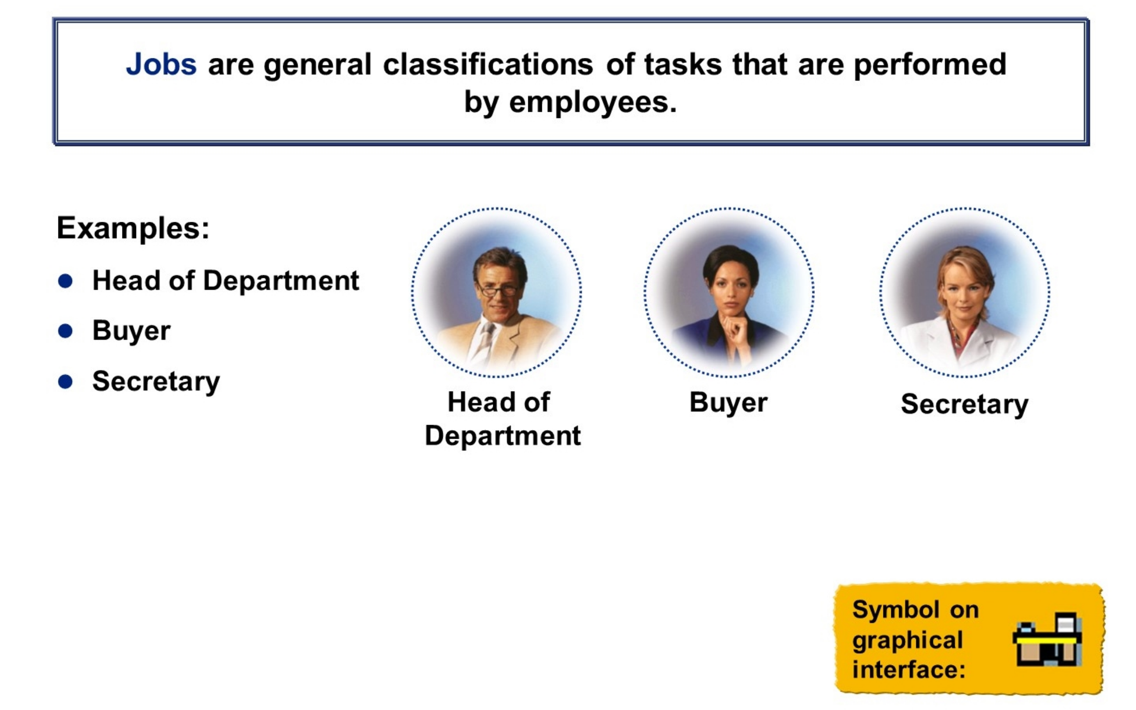

Figure 20: Object Types: Jobs

Jobs are general classifications of attributes, tasks, or responsibilities required for the job. Jobs are used when creating positions and tasks assigned to a job are inherited by the positions created based on that specific job. When you create jobs, keep the tasks as general as possible and as specific as necessary. You can create many positions from one job.

Jobs are important for the following application components:

- Shift Planning
- Personnel Cost Planning
- Personnel Development

Hint:
Your job descriptions should be as general as possible and as specific as necessary.

Positions

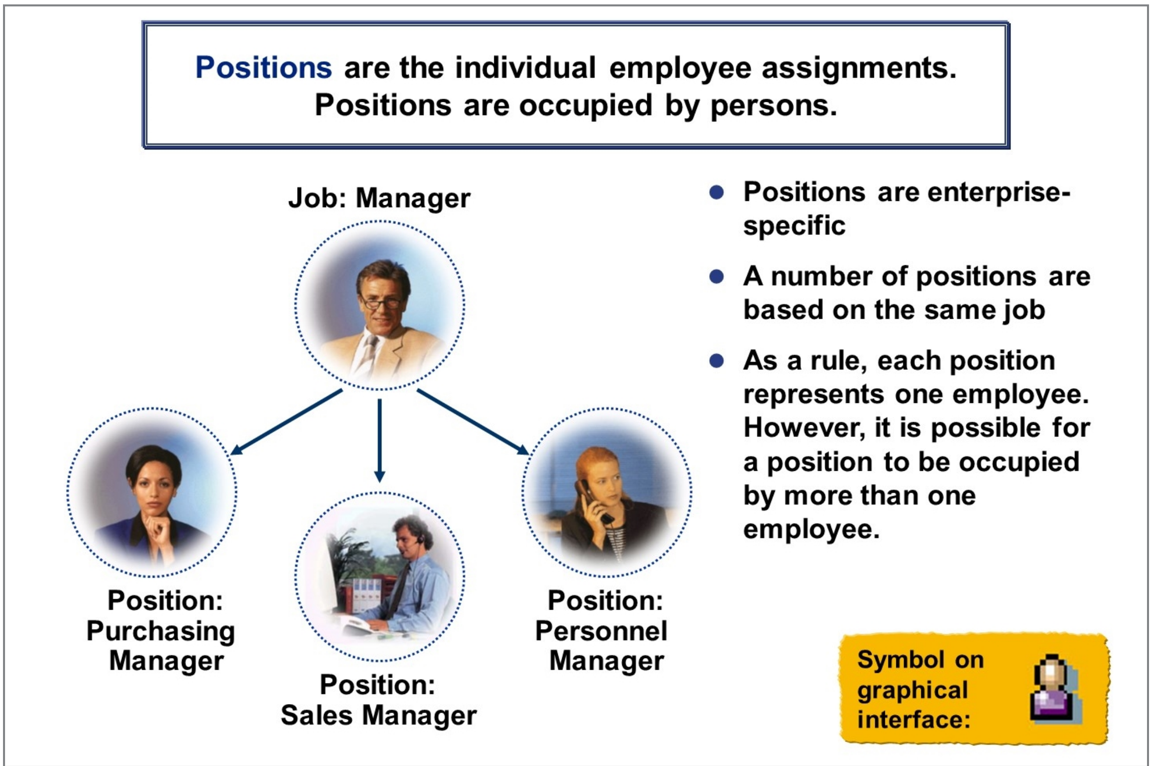

Figure 21: Object Types: Positions

Employees hold positions within your organization. A position inherits a job's tasks and you can also assign additional tasks that refer specifically to one position. Positions can be 100% filled, partially filled, or vacant. One position may be shared by multiple employees, each working less than full time. For example, two employees can hold the same position at the same time. One works 60% of the time and the other works 40%.

Cost Centers

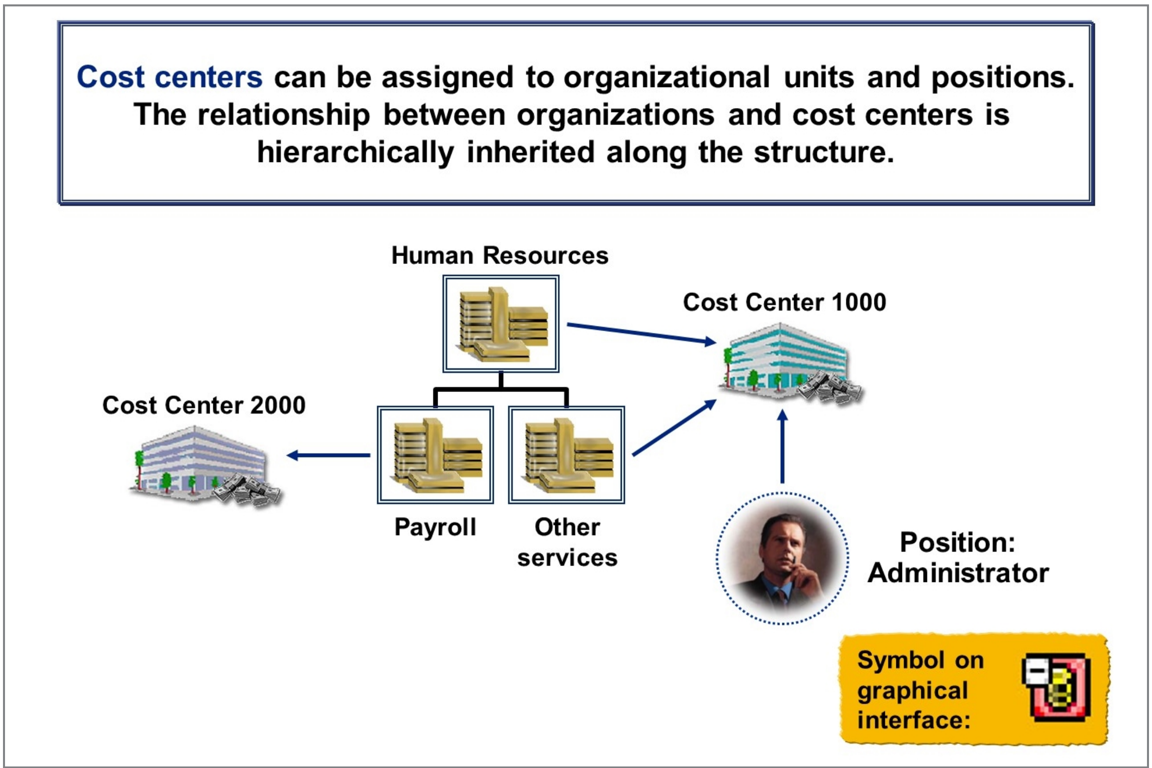

Figure 22: Object Types: Cost Centers

Cost centers are maintained in Controlling and can be linked to either organizational units or positions. Cost center assignments are inherited along the organizational structure. Multiple cost center assignments/percentages can be set up. The cost center can be set at the organizational unit and changed at a lower level such as position or person.

Persons

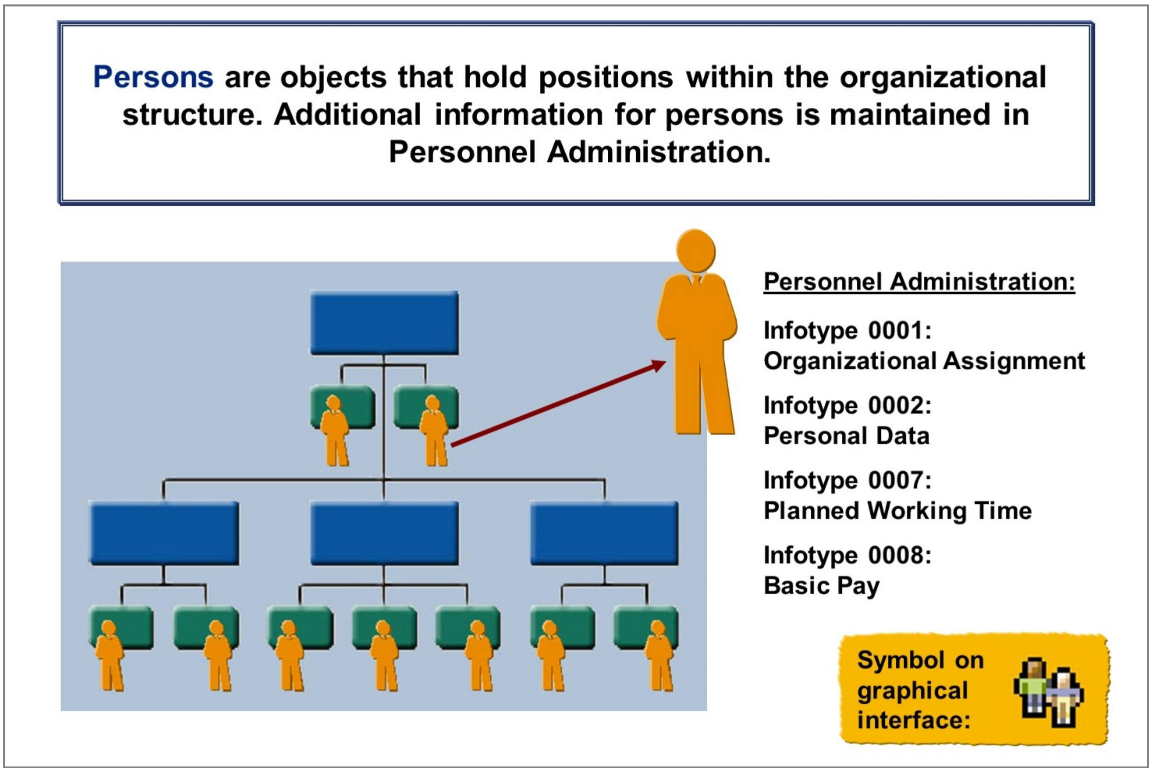

Figure 23: Object Type Persons

Persons are objects that hold positions within the organizational structure (which is governed by Organizational Management). Persons generally represent employees.

Information in Personnel Administration for employees can be defaulted from Organizational Management data, such as the Employee Group/Subgroup, infotype 1013.

Object-Oriented Design

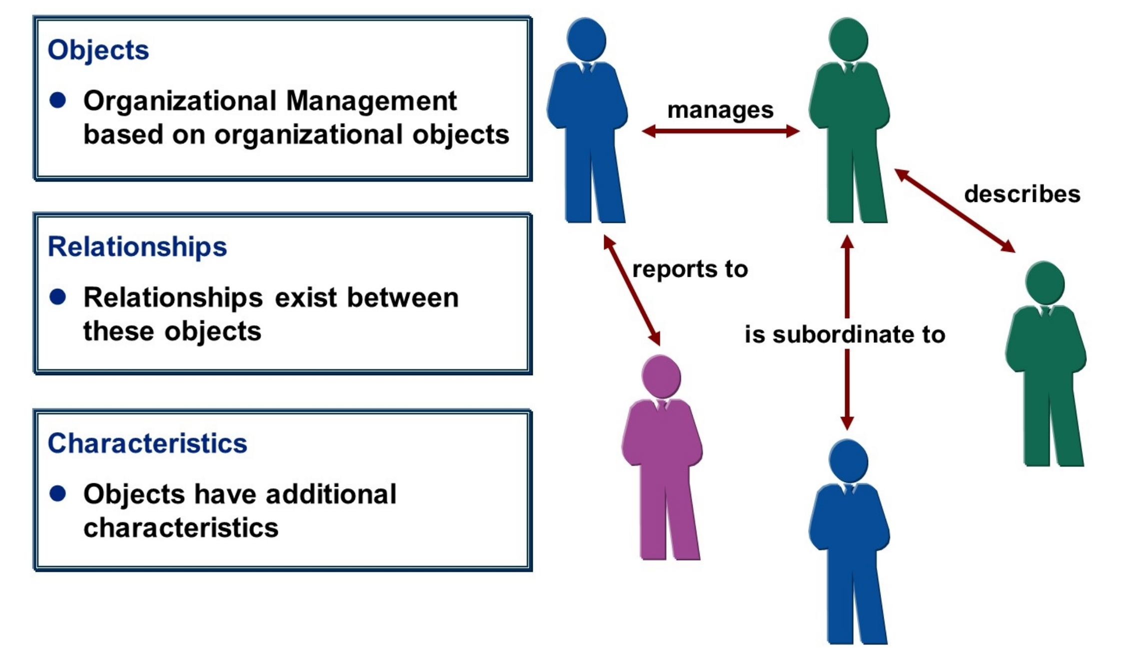

Figure 24: Methodology - Object - Oriented Design

Organizational Management is based on the concept that every element of the organization constitutes a unique object with individual attributes. You create and maintain each object individually and create relationships between the various objects to form a framework for your organizational plan. This gives you a flexible basis for personnel planning, previewing, workflows for approvals, and reporting.

A selection of the main object types for organizational management are as follows:

- Position - Object type S
- Person - Object type P
- Job - Object type C
- Cost Center - Object type K
- Organizational Unit - Object type O

Object Characteristics: Infotypes

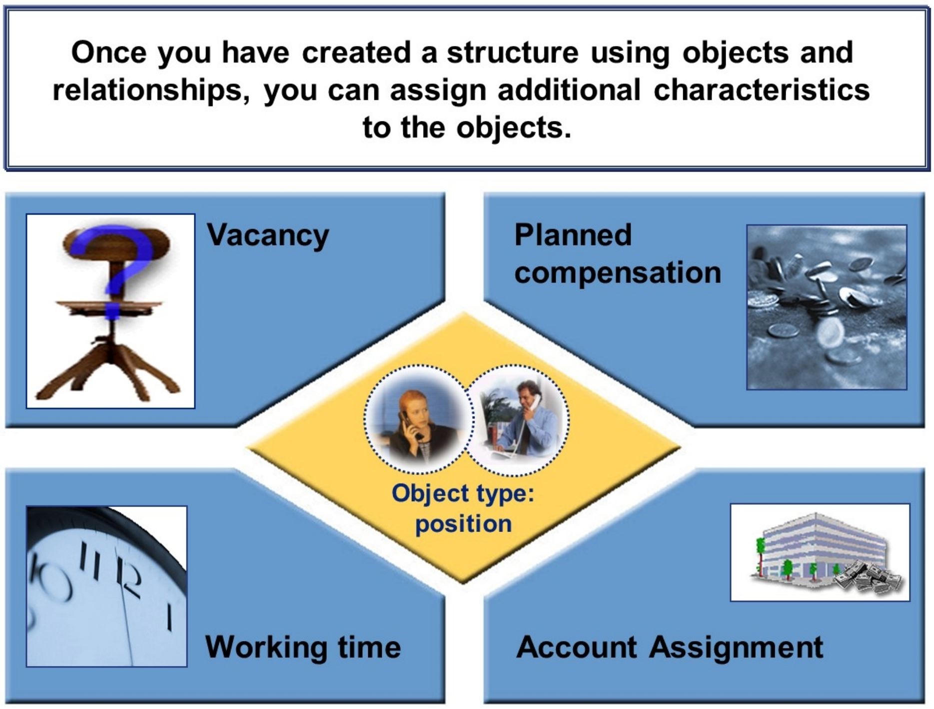

Figure 25: Object Characteristics: Infotypes

Additional characteristics may be created in the form of relationships to other objects, or data stored in other infotypes unique to the object. Once you have created your objects and structures, you can add additional attributes which are organizational management infotypes.

Objects consist of the following parts:

Infotype	Details
Object 1000	• ID Number • Short and Long Text • Validity Period
Relationships 1001	• Contains the relationship(s) between this object and other objects
Other Infotypes	• Additional characteristics of the objects

You can define particular characteristics for an object in each infotype. Some infotypes can be maintained for all object types, such as the object and relationship infotypes. Others are only relevant for particular object types, such as the vacancy infotype, which is only relevant for positions.

Not all infotypes are absolutely necessary. However, they can provide important information on objects.

Methodology Planning

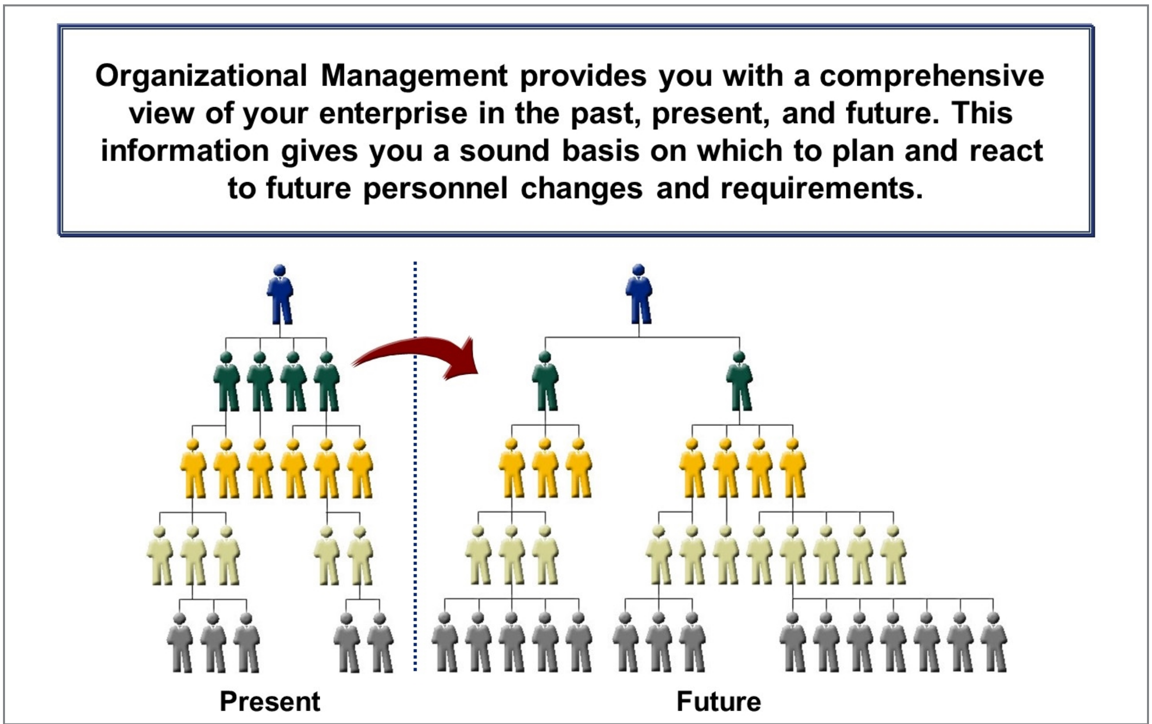

Figure 26: Methodology: Planning

Organizational management provides a comprehensive view of your company in the past, present, and future. This information provides a sound basis on which to plan and react to future personnel changes and requirements. In the example, the left structure shows the current status of the organizational structure and the right, the planned structure in the future. All data is created with a unique two-character alphanumeric code, a start and end date and each is a different plan version and all are completely independent of one another. The Organizational Management component lets you plan and map any kind of organizational restructuring or reorganization of your company.

LESSON SUMMARY

You should now be able to:

- Identify objects included in an organizational plan

Unit 2
Lesson 3

Using the Organization and Staffing Interface

LESSON OVERVIEW

In this lesson you will learn how to enhance the organizational structure using the Organization and Staffing Interface.

Business Example

As the Organizational Management Specialist for your organization, you are responsible for creating, maintaining, and updating the organizational structure. For this reason you require the following knowledge:As the Organizational Management Specialist for your organization, you are responsible for creating, maintaining, and updating the organizational structure. For this reason you require the following knowledge:

- A solid understanding of the organizational structure
- A good understanding of how to create organizational objects

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Update Human Capital Management structures with the Organization and Staffing Interface

Organization and Staffing Interface

Organizational Management includes the update of Human Capital Management (HCM) structures using various tools. One of these tools is the Organization and Staffing Interface.

The Organization and Staffing Interface enables the creation of the following objects:

- Organizational Units
- Positions
- Jobs
- Tasks

You can create these objects quickly by providing basic details and the interface creates the required relationships automatically. Relationships link the objects together providing your organizational plan.

The Organization and Staffing Interface enables the following activities:

- Maintain basic data for your organizational plan.
- Maintain the reporting structure (hierarchy of positions) that exists between the positions in your organizational plan.
- Maintain cost center assignments.

- Maintain certain infotypes.

All objects you create in Organization and Staffing are automatically assigned an object identification and with a status of Active.

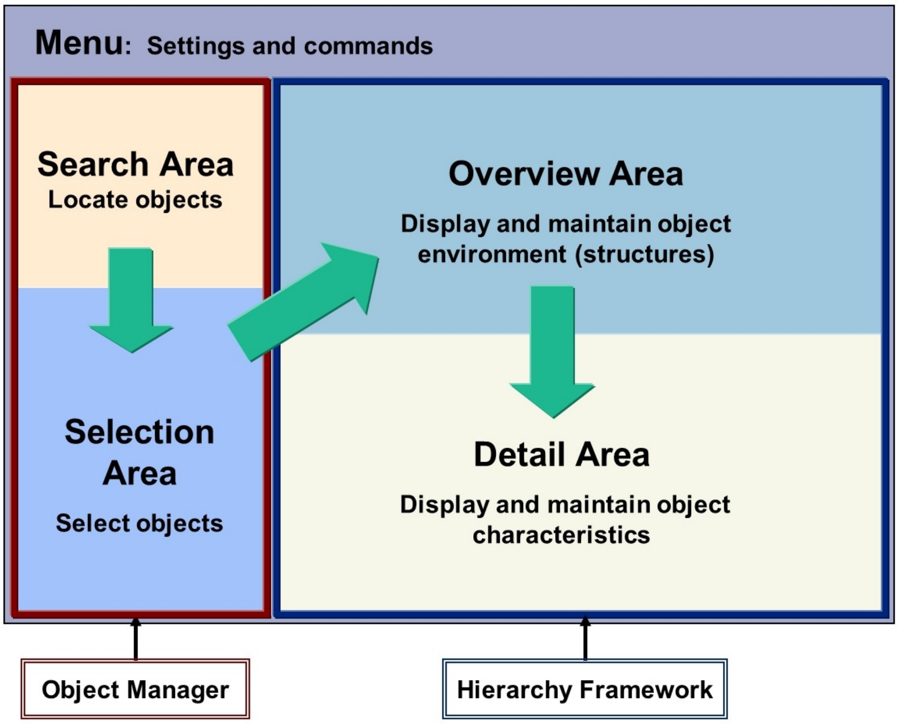

Figure 27: Organization and Staffing: Navigation

The Organization and Staffing interface is divided into 4 work areas.

Work areas of the Organization and Staffing Interface include the following:

Object Manager:

The object manager is on the left side of the screen and is divided into a search area at the top with a selection area below.

- Use the search area to locate objects such as organizational units, persons, jobs, positions, and users.
- The selection area provides the results of the search. Click an object from the results list and the details of the selected object are transferred to the work overview and detail areas.

Hierarchy Framework:

The hierarchy framework is on the right side of the screen and is divided into overview and detail areas.

- The overview area provides a view of the organizational unit hierarchy or the staffing assignments of an organizational unit.
- The detail area is used to maintain objects and their characteristics.

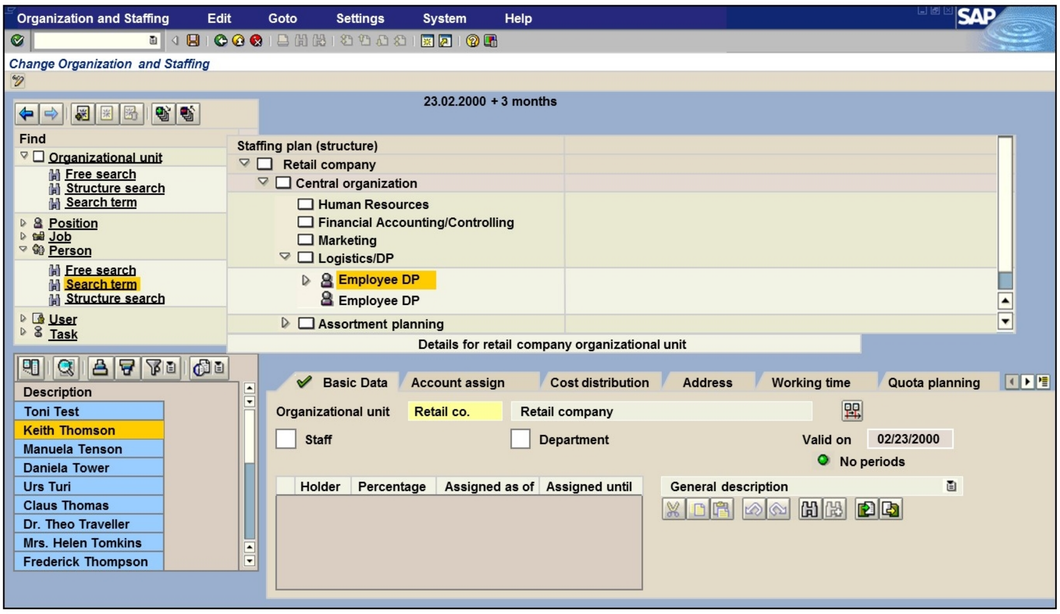

Figure 28: Organization and Staffing

The Organization and Staffing interface provides a view of the selected object and is organized with a navigation tree. Different views are available and you can create additional views to meet your requirements in customizing.

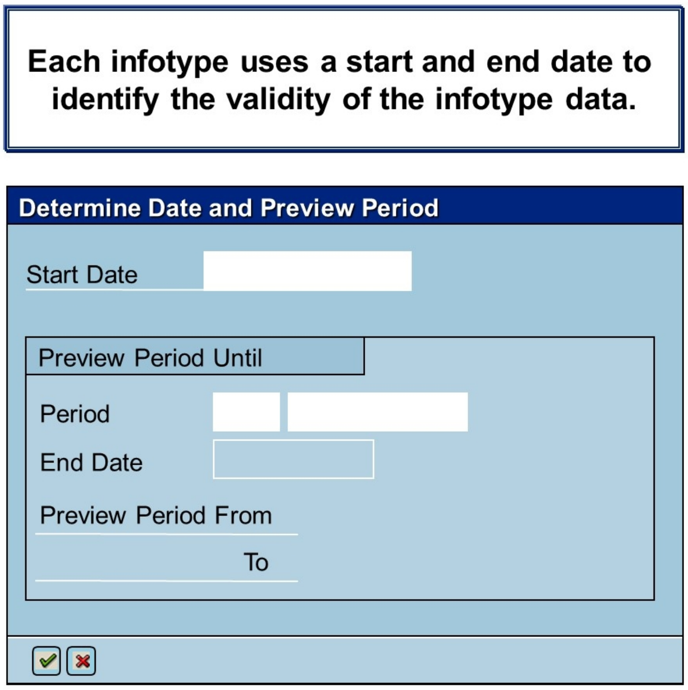

Figure 29: Date and Preview Period

Each infotype uses a start and end date to identify the validity of the infotype data. Validity dates determine the existence of an object. The validity date in the Organization and Staffing Interface determines the point at which data will be displayed.

Validity dates enable you to do the following:

- Define the validity of an object or object characteristics
- Identify changes in your organization while retaining historical data
- Enable the evaluation of the organizational structure on key dates
- Evaluate key data or specific time periods from the past, present, or future

Figure 30: Important Icons

The Organization and Staffing Interface provides details of your organizational plan and includes infotype icons opposite the objects. A list of infotype icons is displayed by selecting the Icon Legend.

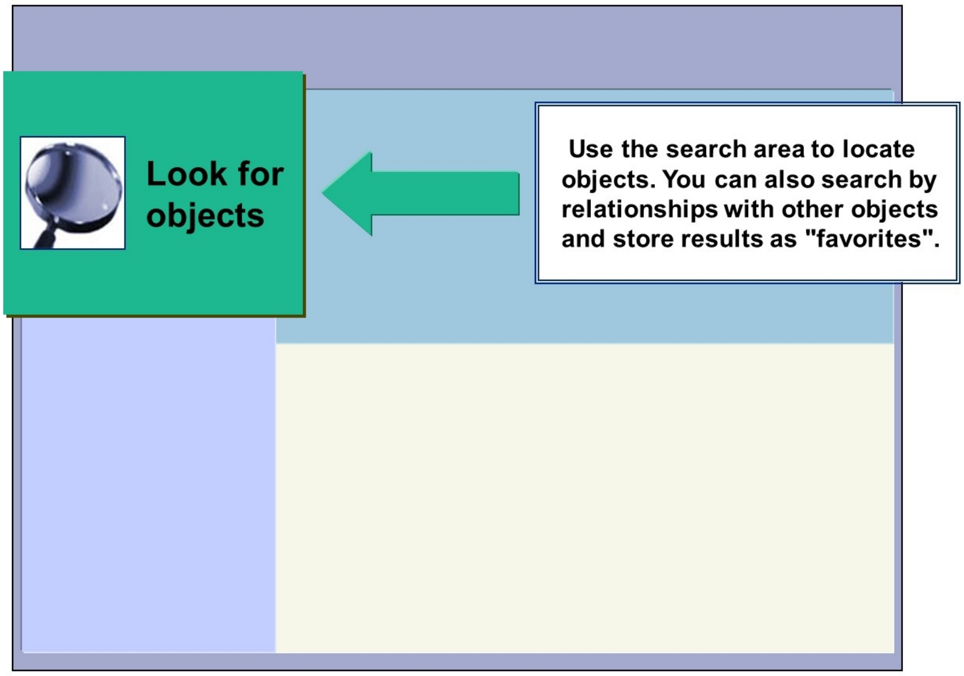

Figure 31: Search Area

The search area provides tools to search for different objects in Organizational Management. You can search by relationships with other objects and store results as favorites.

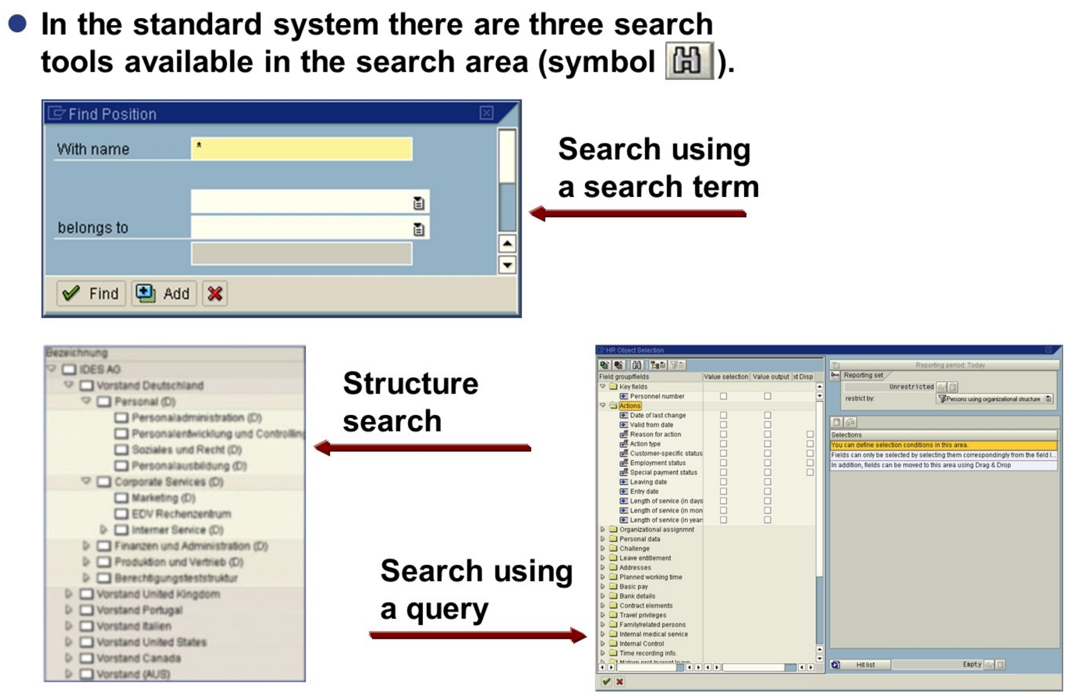

Figure 32: Search Tools in the Search Area

Delivered search tools allow you to find objects using the name, abbreviation, or ID of the object. You can also search for objects that are assigned directly or indirectly to another object (for example, all positions for a specific organizational unit).

The following search tools are available:

- Search Term
- Structure Search
- Free Search (search using a query)

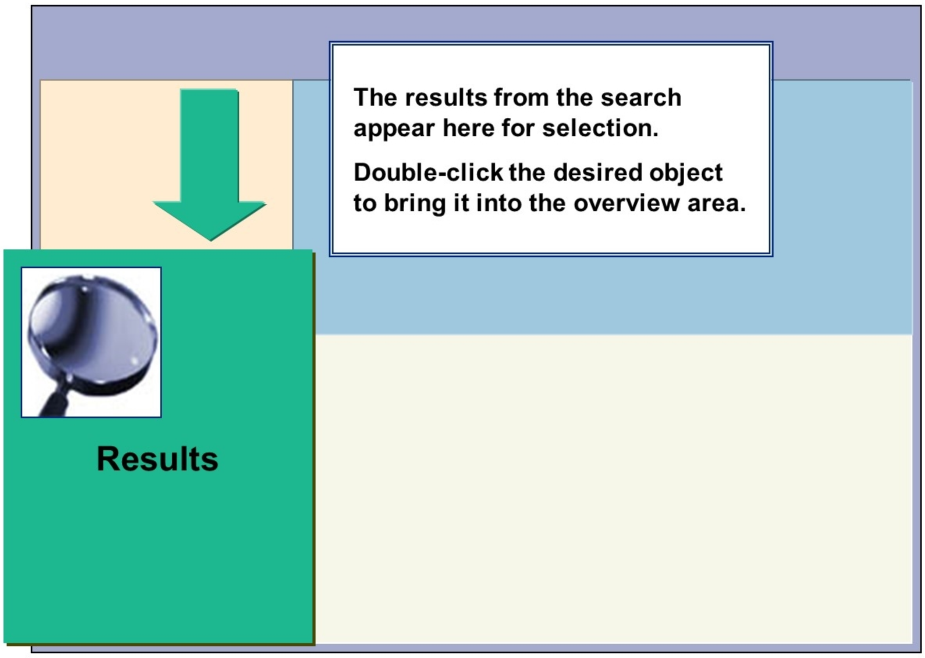

Figure 33: Selection Area

The results of your search appear in the hit list. Double-click the object you want to edit and it is transferred to the overview area.

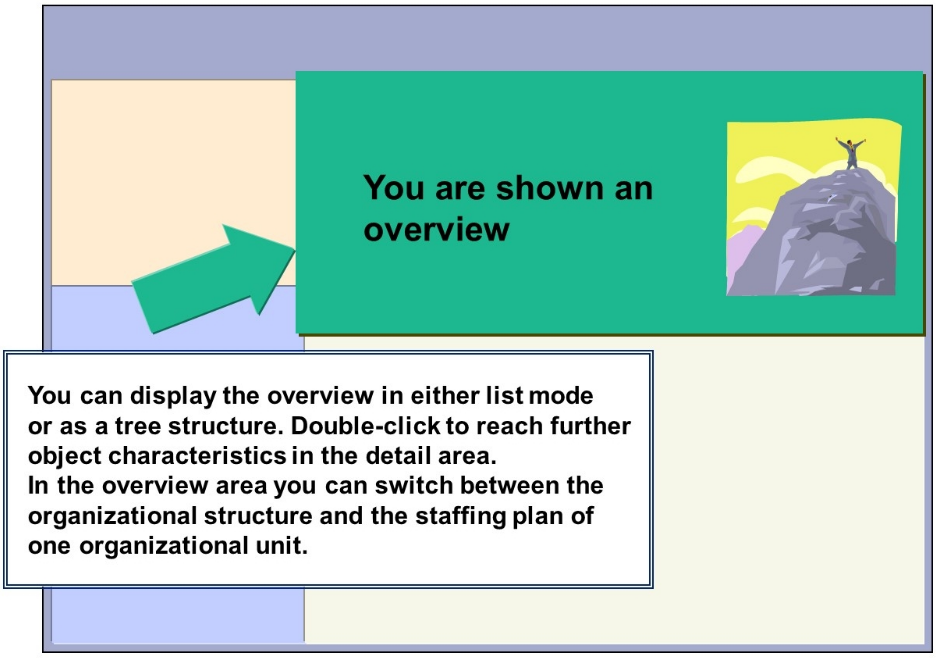

Figure 34: Overview Area

Organizational units can be displayed in the tree structure or in list mode. Double-click an object and additional information is displayed in the detail area. Characteristics of the selected object can be updated in the detail area.

The overview area is used for the following activities:

- Create new objects
- Display organizational units in a tree structure
- View a structure as a list to display staffing assignments
- Define which details are displayed
- Drag objects from the Selection Area to assign new positions, persons, or users to a staffing plan.
- View objects using the *GoTo* selection

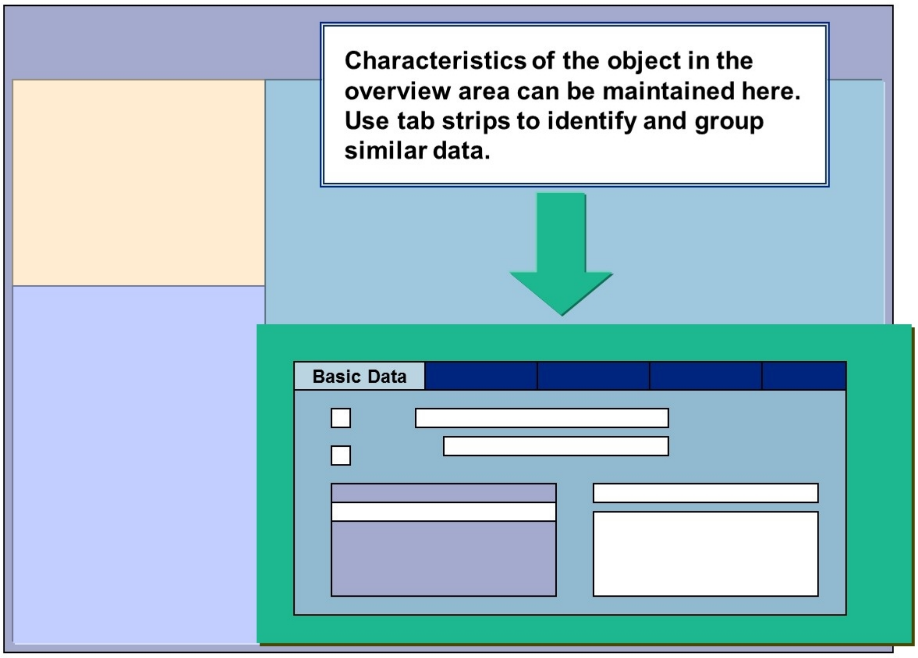

Figure 35: Detail Area

Different attributes, relationships, and characteristics of objects are grouped on different tab pages in the detail area. You can maintain them directly where they are or use Drag & Drop to maintain them outside the selection area. Relationships are automatically created using Drag & Drop. When adding attributes in this area, you are creating infotypes.

Icons are displayed if functionality is possible. Data entered can be undone and restored using the appropriate icons provided the data has not been saved.

LESSON SUMMARY

You should now be able to:

- Update Human Capital Management structures with the Organization and Staffing Interface

Unit 2
Lesson 4

Reporting on Existing Positions

LESSON OVERVIEW

In this lesson you will learn how to execute an organizational structure report.

Business Example

As the Organizational Management Specialist for your organization, you are responsible for creating, maintaining, and updating the organizational structure. For this reason you require the following knowledge:

- A good understanding of the organizational structure
- A basic understanding of reporting on organizational objects

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Execute a report on existing positions

Evaluation Paths and Reports

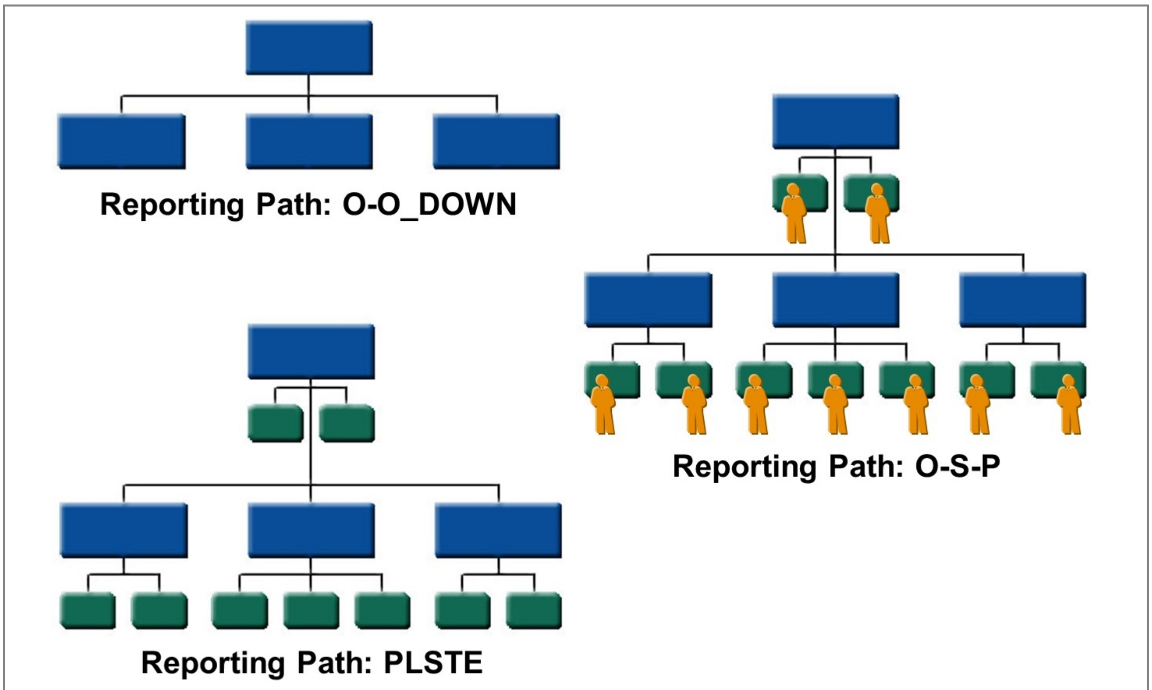

Figure 36: Evaluation Paths

Evaluation paths are the foundation for organizational management reports. Evaluations in organizational management require a start object and an evaluation path. The evaluation path determines which relationships the system should use to reach a different object.

Many evaluation paths are standard delivered. If you cannot find a suitable evaluation path in the standard system, you can create your own evaluation paths in customizing.

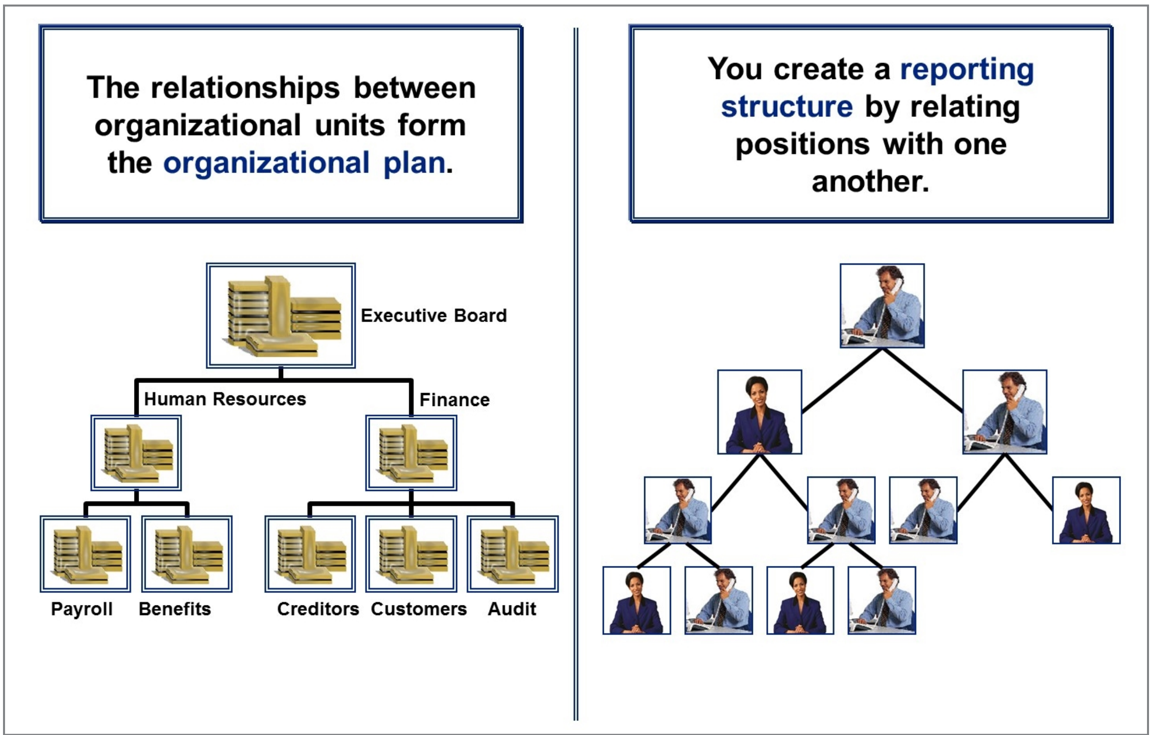

Figure 37: Reporting

Organizational plans and reporting structures represent only a fraction of the reporting functionality that is available in Organizational Management.

Organizational management reporting options are organized according to different object types. Navigate in the SAP Easy Access screen by choosing: *Human Resources* → *Organizational Management* → *Info System*. Open the folders for the various objects to view available reports.

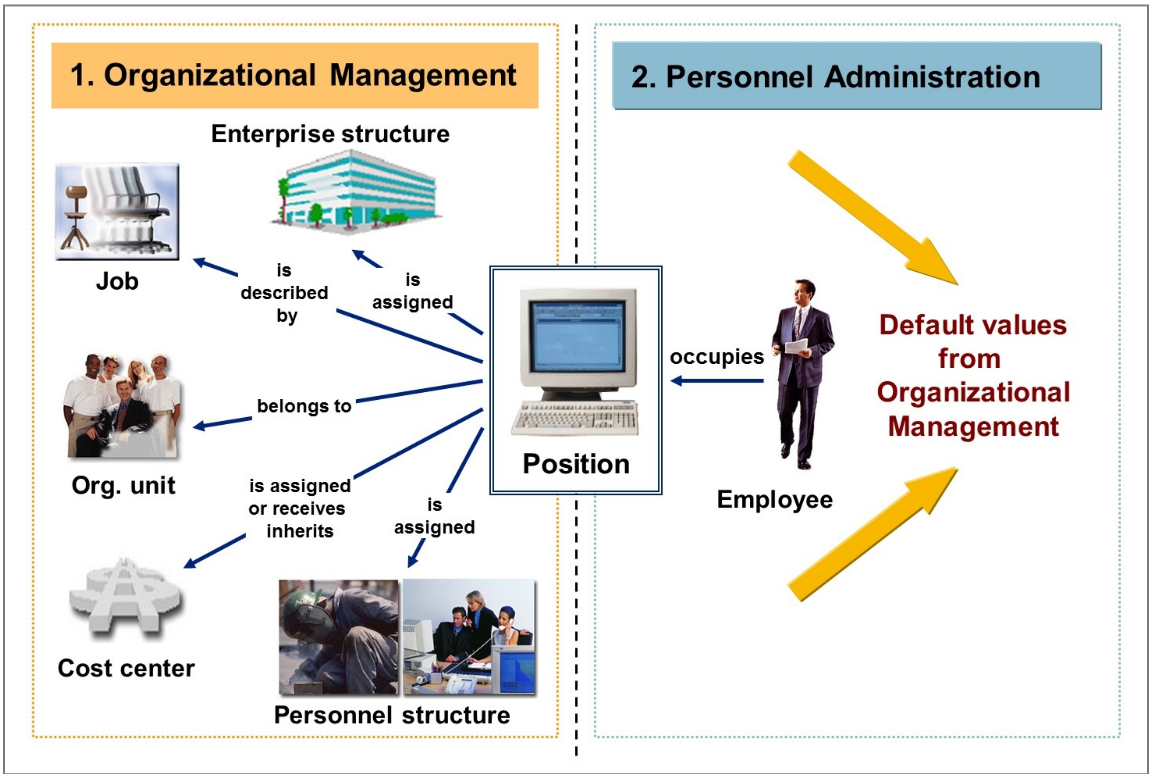

Figure 38: Integration: Personnel Administration and Planning

If Personnel Administration and Organization Management are integrated, you can enter the position in the Actions infotype (0000). This infotype must be maintained first. You cannot overwrite the fields job, organizational unit, or cost center. They specify the relationships to the position.

Default values can be supplied for the personnel area, personnel subarea, business area, employee group, and employee subgroup fields.

LESSON SUMMARY

You should now be able to:

- Execute a report on existing positions

Learning Assessment

1. The foundation of Organizational Management is the organizational plan.

   Determine whether this statement is true or false.

   ☐ True

   ☐ False

2. Which infotype provides information on an employee's place in each of the Human Capital Management structures?

3. What objects can be created using the Organization and Staffing Interface?

4. The evaluation path determines which relationships the system should use to reach a different object. What do evaluations in organizational management always require?

Learning Assessment - Answers

1. The foundation of Organizational Management is the organizational plan.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

   Correct. The organizational plan is the foundation of Organizational Management as it provides a complete model of the structural and personnel environment of the company. Hierarchies and reporting structures are clearly laid out.

2. Which infotype provides information on an employee's place in each of the Human Capital Management structures?

   You can see a person's place in each of the three structures on infotype 0001 - Organizational Assignment.

3. What objects can be created using the Organization and Staffing Interface?

   You can create organizational units, positions, jobs, and tasks.

4. The evaluation path determines which relationships the system should use to reach a different object. What do evaluations in organizational management always require?

   Evaluations in organizational management always require an evaluation path and a start object.

UNIT 3

Personnel Administration

UNIT OBJECTIVES

- Identify the characteristics of infotypes
- Create an infotype record for an employee
- Execute fast entry to update infotype records
- Complete a series of infotypes for an employee using an action
- Maintain employee data using SAP NetWeaver Business Client

Unit 3
Lesson 1

Maintaining Employee Information

LESSON OVERVIEW

This lesson shows you how to maintain employee data.

Business Example

As a Human Resources Administrator, you are responsible for the maintenance of employee information and must be able to update existing and create new data records. For this reason, you require the following information:

- A good understanding of how to find employee information
- A good understanding of the various ways to maintain employee information

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Identify the characteristics of infotypes
- Create an infotype record for an employee
- Execute fast entry to update infotype records

Personnel Administration

Employee information is broken down into different types of data, for example name, address, and basic pay. This information is stored on infotypes based on the type of data. For example, personal data is stored on the Personal Data Infotype 0002 and includes details such as first and last name, date of birth, and marital status. Information on the pay of an employee is stored on the Basic Pay Infotype 0008 and this includes salary, hourly rates, and premiums, for example. Infotypes can be created, updated, changed and deleted and each infotype record has a validity interval or key date.

There are several ways to maintain employee data on infotype records.

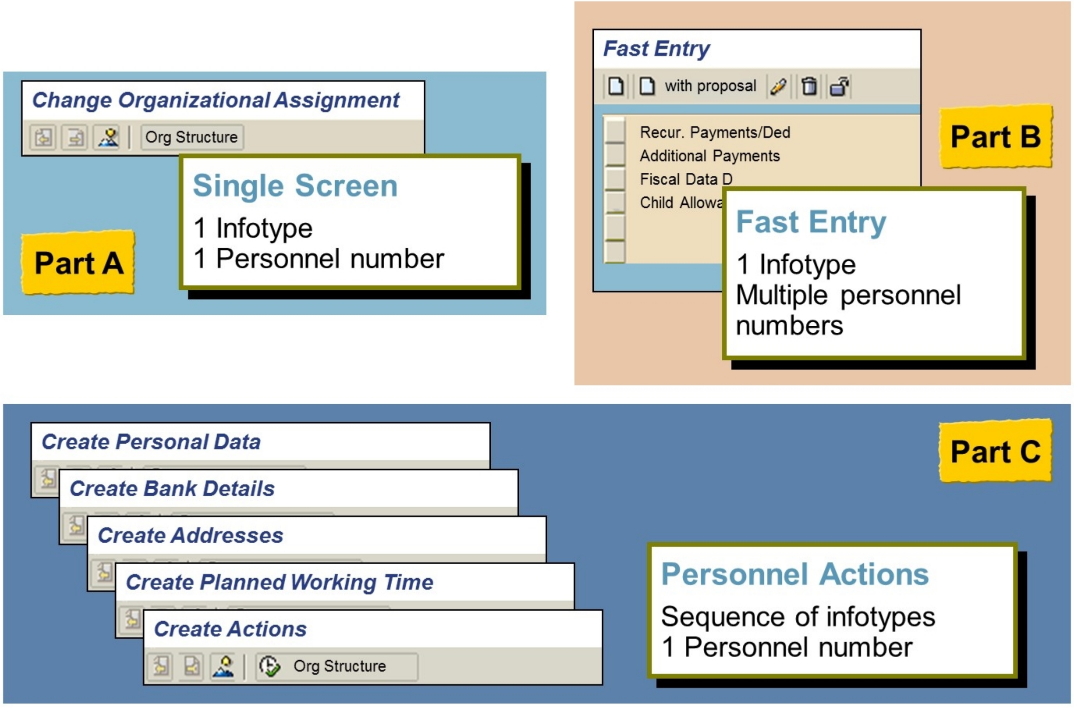

Figure 39: Infotype Maintenance

Different ways to process infotypes records include the following:

Single Screen Maintenance

Single screen infotype maintenance includes calling individual infotypes, one at a time, to maintain data for a specific employee.

Personnel Actions:

A personnel action is used to present a series of infotypes for one employee in a specific order. These infotypes are completed one at a time and upon saving, the next infotype in the sequence is presented.

Fast Entry:

Fast entry enables you to maintain one infotype for more than one personnel number at the same time.

Infotype Maintenance

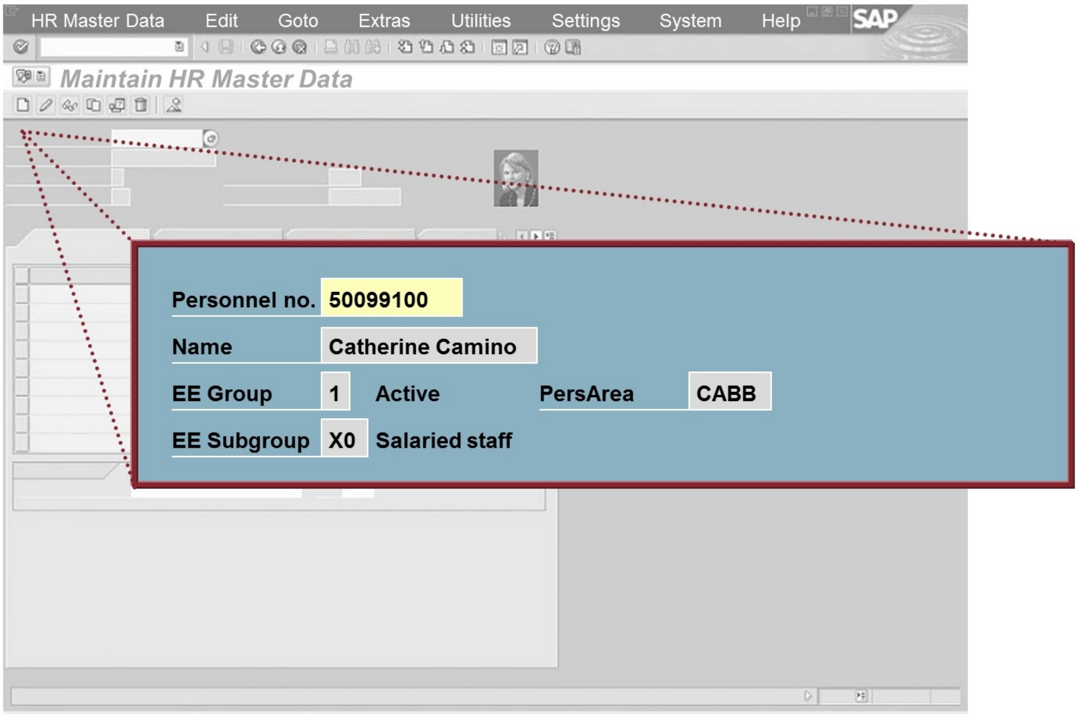

Figure 40: Maintaining Infotypes: Overview

The first step in maintaining employee information is finding the personnel number linked to the individual. Search help functionality enables you to search for a specific individual.

Search Help

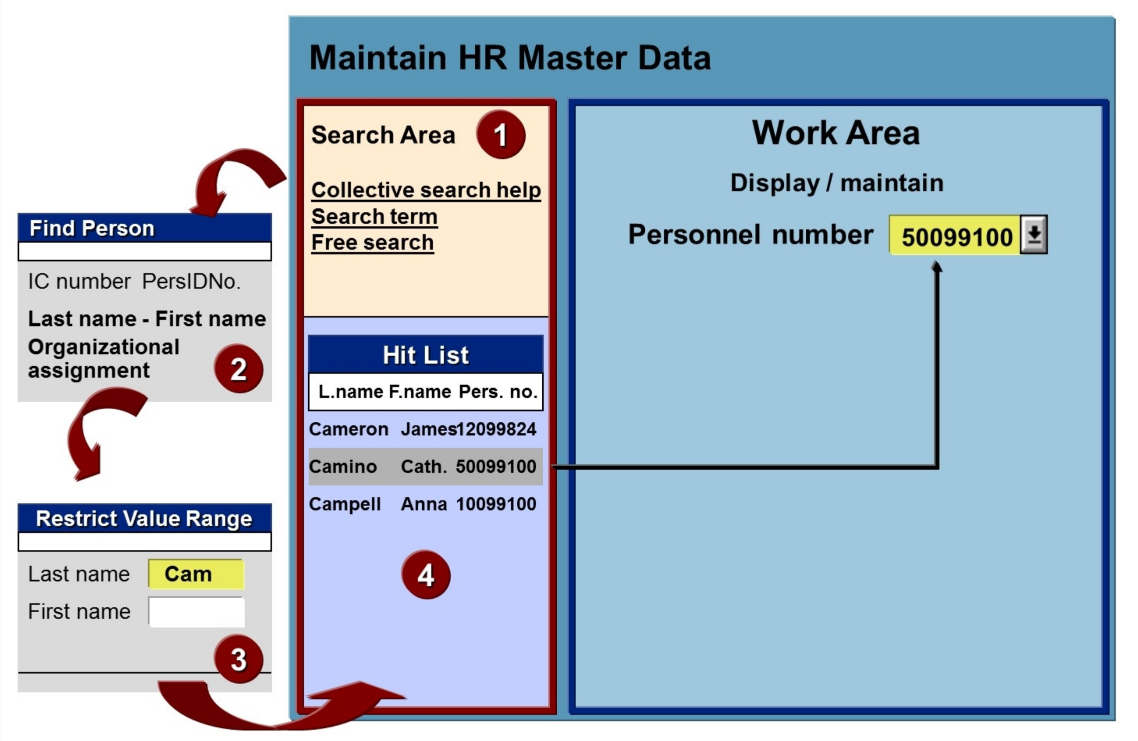

Figure 41: Search Help (1)

The Search Help function in the work area enables you to select personnel numbers according to criteria such as last name, first name, birth date, organizational assignment, and so on.

To search for a personnel number using Search Help functionality, proceed as follows:

1. Choose one of the search options from the search area (for example, collective search help, search term, free search).
2. Further define the type of search you want to use (for example, enter a first name, last name, organizational unit).
3. Restrict the value range of the search (for example, to search by last name, enter the last name of the employee).
4. The hit list displays the personnel numbers that match the selection criteria you entered in the previous step (for example, if you searched by last name, the hit list includes all employees with that specific last name).
5. Double-click the name of the employee you wish to work with and their specific data is displayed in the work area.

Search Help (2)

Search Help can be accessed through the personnel number field or directly in the Search Area.

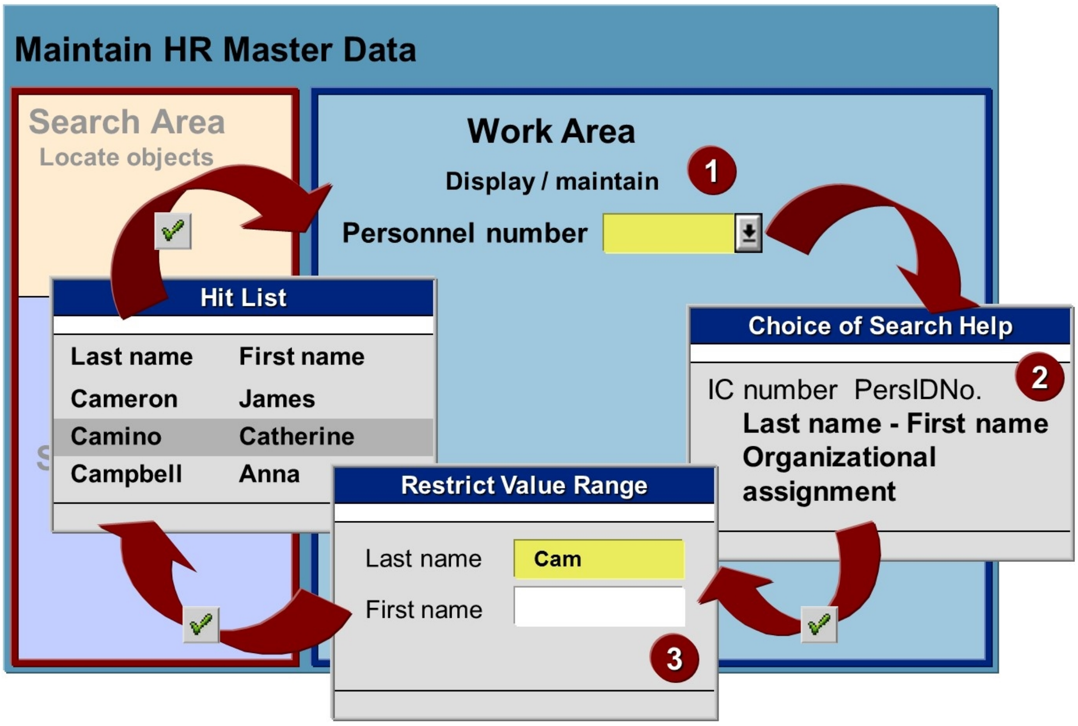

Figure 42: Search Help (2)

You can also use search help functionality directly from the personnel number field. You can select personnel numbers according to criteria such as last name, first name, birth date, organizational assignment, and so on.

To search from the personnel number field, proceed as follows:

1. Position the cursor on the Personnel Number field and click the arrow symbol on the far right of the field or choose F4.
2. Select the type of search help you want to use (for example, first name, last name, organizational unit).
3. On the next screen, restrict the value range of the search.
4. The system displays a list of all the personnel numbers that match your selection criteria. Double-click the desired data record from the hit list and the specific data for the selected individual is presented.

Initial Entry Screen

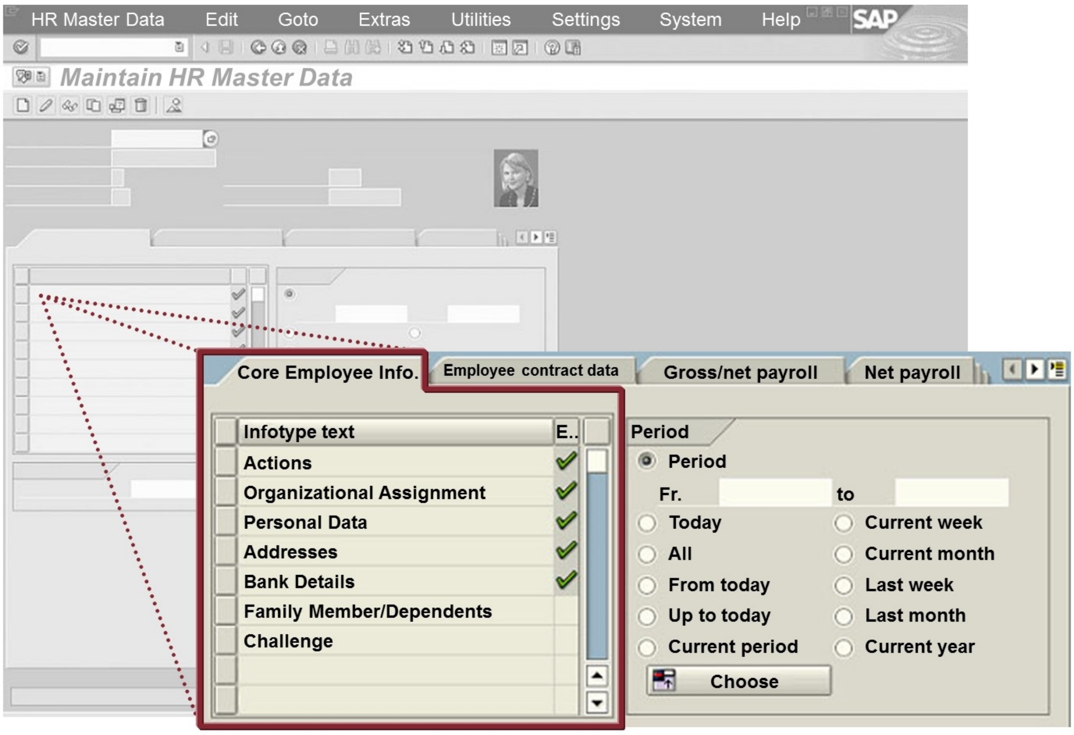

Figure 43: Initial Entry Screen for Infotype Maintenance

Frequently used infotypes are grouped together by subject matter and assigned to static menus. You can set up infotype menus to meet your business requirements. One infotype can be included in more than one menu and rarely used infotypes may not be included in any menus at all.

Infotypes can be accessed using direct selection whether or not the infotype is displayed in a menu. To access a particular menu, select the tab page. The green check mark next to the individual infotype indicates a record exists and that you have the security authorization to view or modify the data for the selected personnel number.

Infotypes

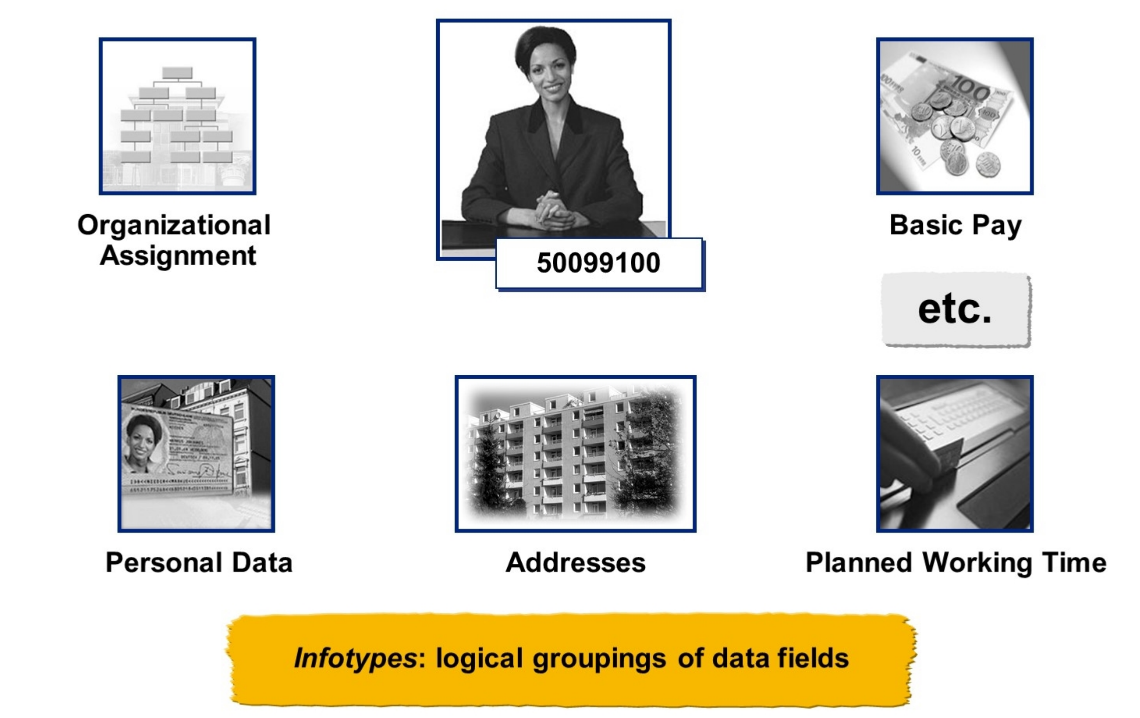

Figure 44: Infotypes

Infotypes contain information on individual employees in data fields such as last name, first name, and date of birth. Data fields are grouped into data groups or information units according to their content. In Human Resources, these information units are called information types or infotypes for short.

HR data is stored in groups that logically belong together according to content. For example, place of residence, street, and house number make up an employee's address and are consequently stored (together with additional data) in the Addresses infotype.

Infotypes have names and four-digit keys. The Addresses infotype, for example, has the key 0006.

Subtypes of Infotypes

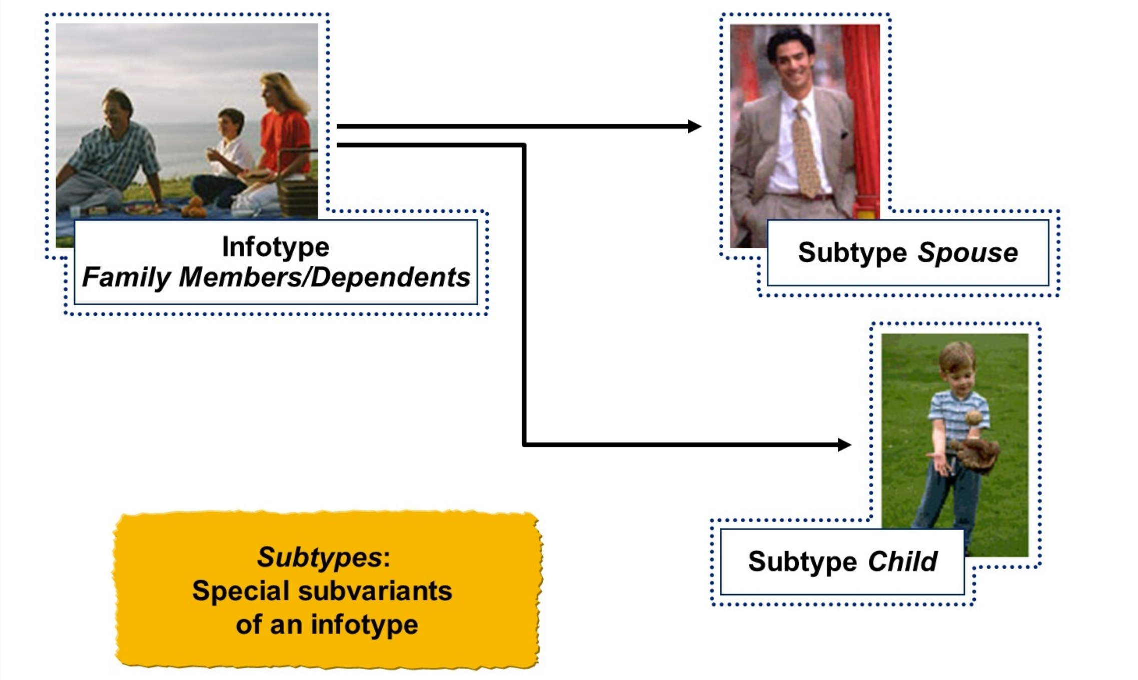

Figure 45: Subtypes of Infotypes

Many infotypes have subtypes which further defines the type of information stored for individuals. Subtypes of infotypes makes it easier to manage information and allows you to assign different control features to different subtypes (for example time constraints).

An example of an infotype with various subtypes is the Family Member/Dependents infotype 0021:

Spouse:

- Spouse is subtype 1
- Spouse has a time constraint of 2 (only 1 record of this subtype may exist at the same time)

Child:

- Child is subtype 2
- Child has a time constraint of 3 (many records of this subtype may exist at the same time)

Selection Using Infotype Number

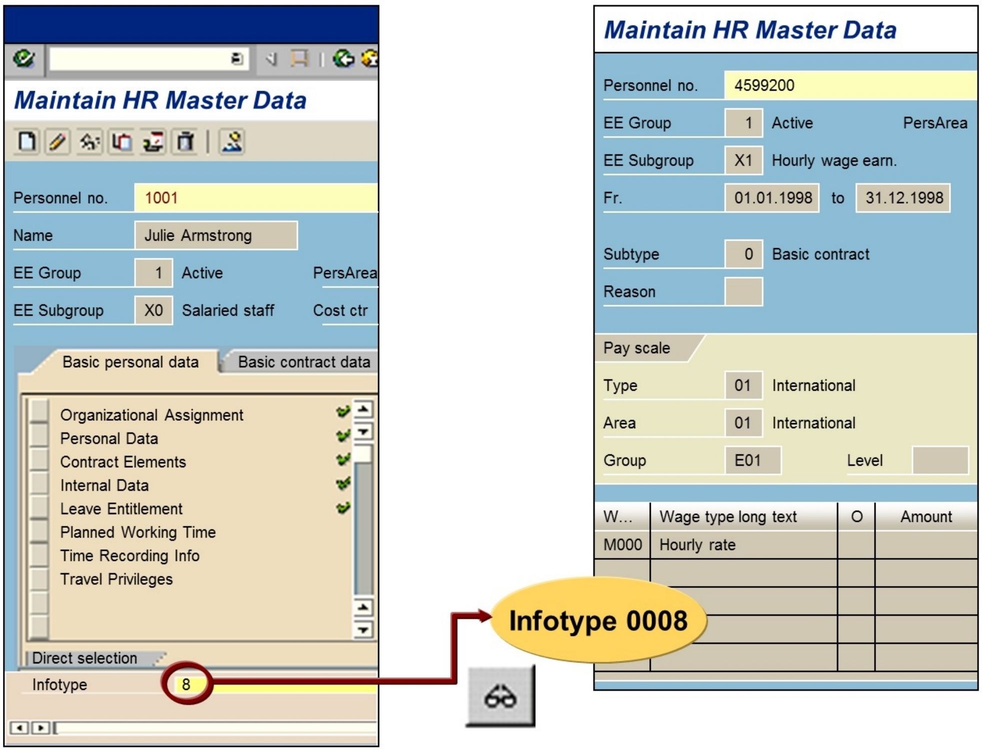

Figure 46: Selection Using Infotype Number

In the Direct Selection area at the bottom of the master data screen, you can call the infotype you wish to work with in a variety of ways.

You can access an infotype in the following ways:

- Enter the infotype number in the Direct Selection Infotype field and select enter to continue. The name of the infotype is presented in the field. Choose the desired activity (display, copy, create, etc.).
- Enter the name or part of the name of the infotype (for example: Pay). All infotypes with the word Pay in the name is presented in the tab page. Choose the desired infotype by selecting the button to the left of the name, select the desired activity (display, copy, create, etc.).

Hint:
You can add the user parameter HR_DISP_INFTY_NUM with a value of X to view the infotype numbers on the infotype screen.

Initial Entry Screen

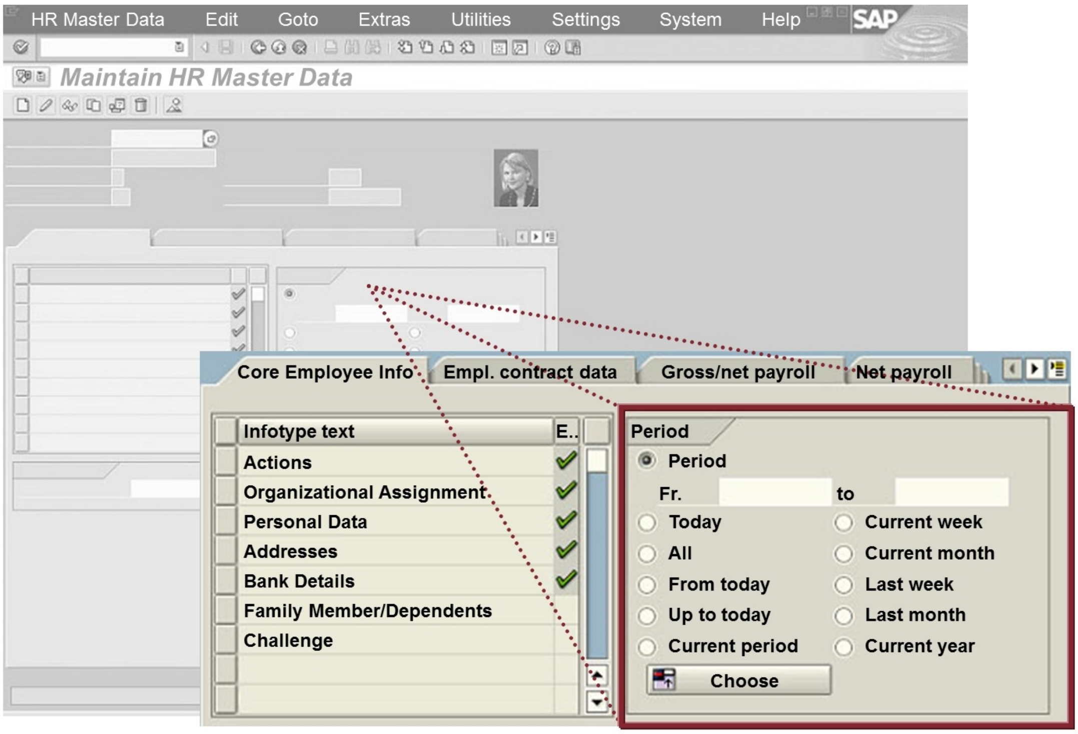

Figure 47: Initial Entry Screen for Infotype Maintenance

Data records are always stored in the system with a start date and an end date, with a few exceptions such as infotype 0015, Additional Payments, which uses a Date of Origin or Payroll Period. This allows you to save data for exact periods.

When you select infotypes, you can specify a selection period in the displayed screen area.

Time Constraints

When an infotype is updated, previous data remains in the system as part of historical data. Each infotype record is stored with a specific validity period or key date. This means that the system can contain more than one record of the same infotype at the same time, even if their validity periods coincide.

Time constraints control how information for infotypes is handled. A time constraint is an attribute of infotypes or subtypes which controls system reaction when data is updated. The time constraint controls whether the system is to, for example, delimit, delete, etc., the existing record.

If you enter and save new information in an infotype, the system checks whether a record already exists for this infotype. If this is the case, the system reacts based on rules or time constraints set up for that particular infotype or subtype.

Master data time constraints for infotypes and subtypes include the following:

Time Constraint	Definition
Time Constraint 1	• Infotypes or subtypes with time constraint 1 must be unique. Only one valid record can exist for any given period. • There can be no gaps between records. • Infotypes with time constraint 1 must exist in the system (for example Basic Pay, Personal Data, Planned Working Time). • When you add a new record to an infotype with time constraint 1, the system delimits the overlapping infotype record on the key date and adds the new record. • If you delete an infotype with time constraint 1, the previous record is automatically extended. - For example, Basic Pay infotype (0008): If you delete the existing Basic Pay infotype record, the system will automatically extend the dates of the previous Basic Pay infotype record.

Time Constraint 2	• Infotypes or subtypes with time constraint 2 can only have one record for a given time period.
	• An infotype with time constraint 2, does not have to exist.
	• There can be no overlapping records. If two infotype records overlap, the system adapts the previous record accordingly by deleting, dividing, or delimiting it.
	  - An example of an infotype with time constraint 2 is the Family Member/Dependents infotype (0021), subtype Spouse (1).
	    ▪ The employee does not have to have a spouse, but if one does exist, there must be only infotype record with this subtype at any given time.

Time Constraint 3	• Infotypes or subtypes with time constraint 3 do not have to exist. • There can be gaps between records. • There can be overlapping records. If records overlap, the system does not react at all. - Examples of infotypes with time constraint 3, are Monitoring of Tasks (0019) and Objects on Loan (0040).

Generating Histories

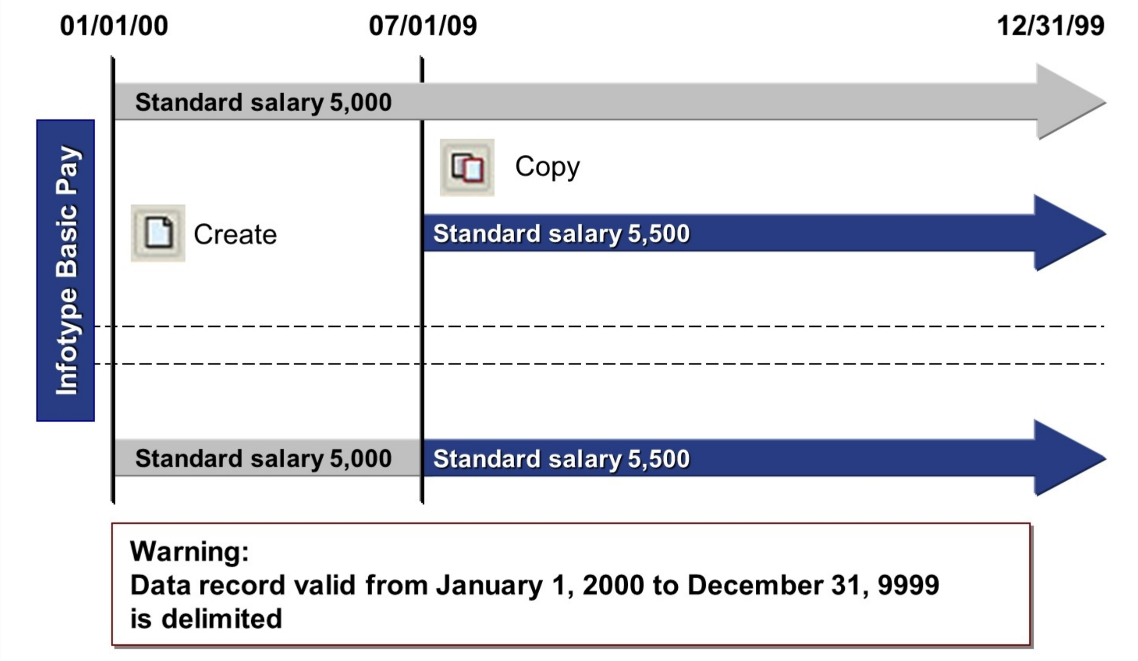

Figure 48: Generating Histories

If you create a new record when a previous record already exists, the system reacts based on the time constraint of the infotype or subtype. In master data, there are three different time constraints which are characteristics of infotypes or subtypes.

Infotype Maintenance

Initial Entry Screen for Infotype Maintenance

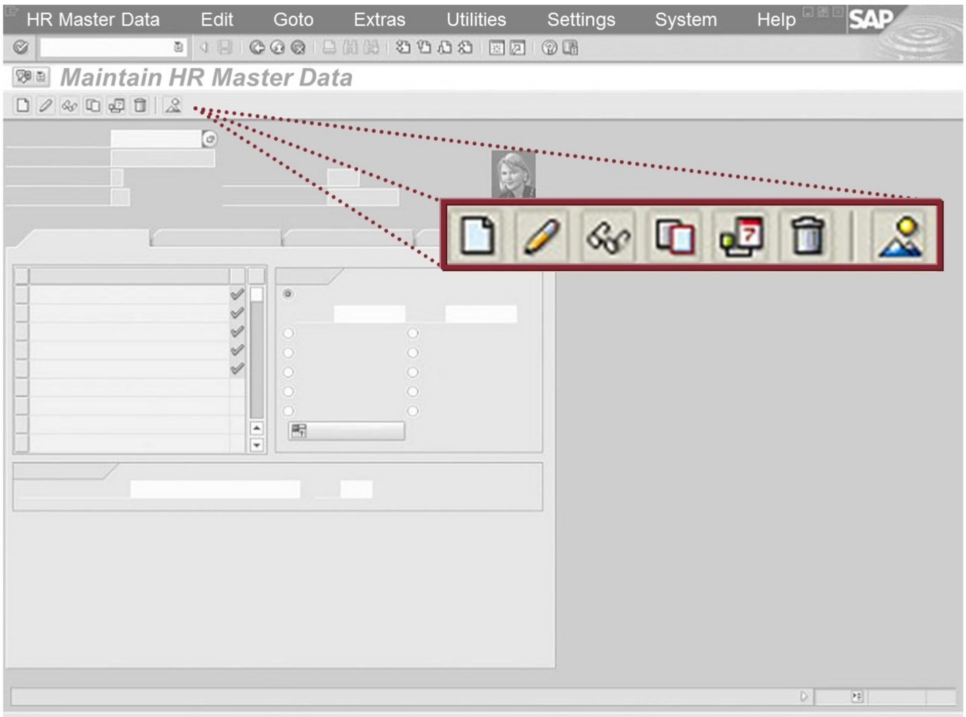

Figure 49: Initial Entry Screen for Infotype Maintenance

There are various processing options you can use to maintain master data.

Maintaining Infotypes

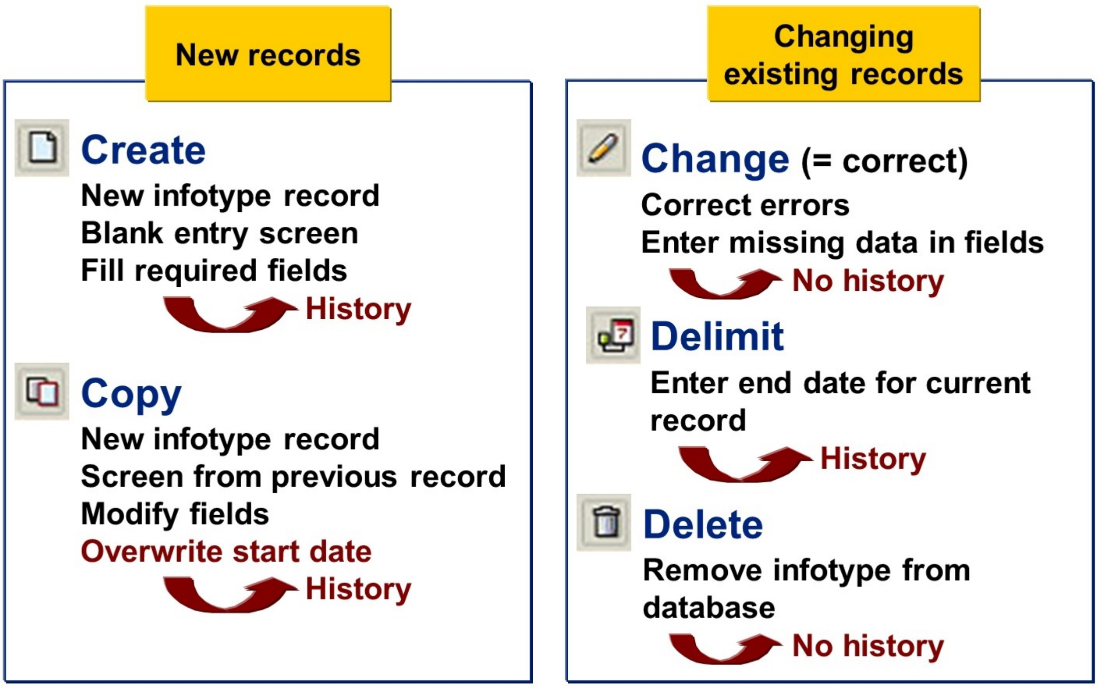

Figure 50: Maintaining Infotypes

Infotype maintenance means processing data already in the system, and entering and saving new data. You can change existing records and add new records for an employee.

Infotype processing options include the following:

Change:

- You can correct an existing record without creating a new one.
- Use the change option to overwrite an existing infotype record, but not to create a new infotype record.
- Changes to infotype records are not included in the history.

Create:

- Enter new data on a blank entry screen
- The old record, which may be delimited if necessary, remains in the system.
- Infotype history is created using the appropriate validity periods.

Copy:

- Create new infotype records
- Enter data on an entry screen containing the currently valid data.
- Update the required fields by overwriting the existing values.
- Updates infotype history

Delimit:

- End dates the record

Delete:

- Permanently deletes the record (providing the time constraint will allow)

Fast Entry

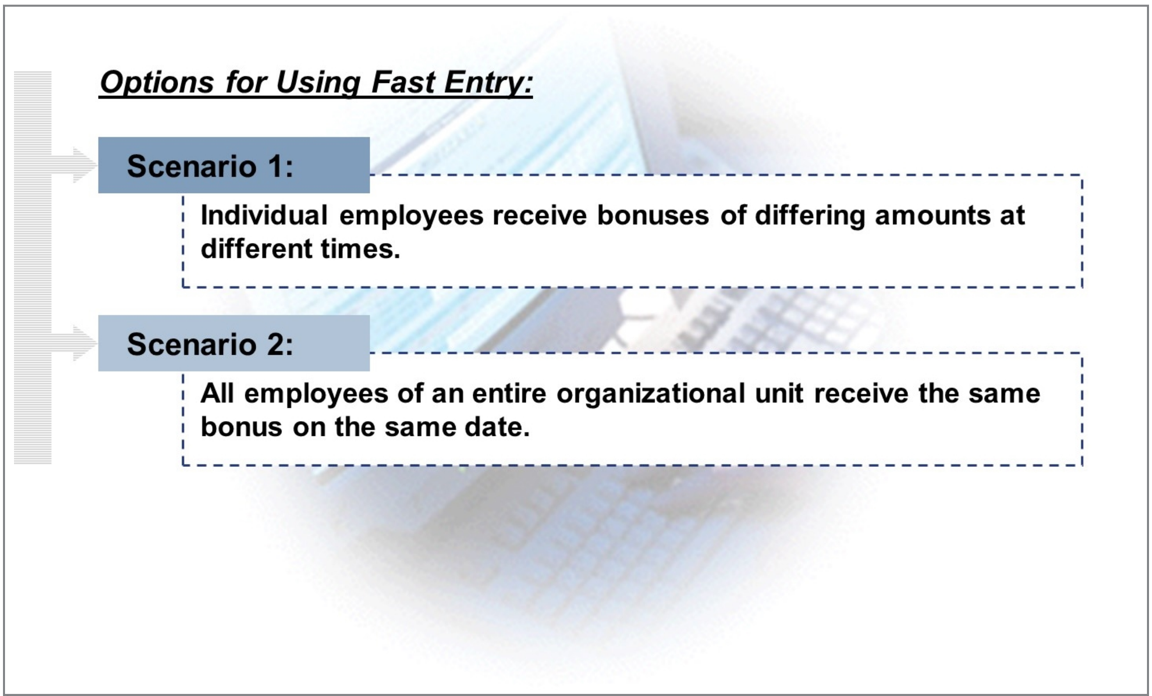

Figure 51: Fast Entry

Fast entry enables you to maintain an infotype for more than one personnel number on a single screen. This makes data processing faster and more efficient. If the amount of data is large, it can be processed using batch input which means the infotypes are updated by a batch input session processed at night via a batch job.

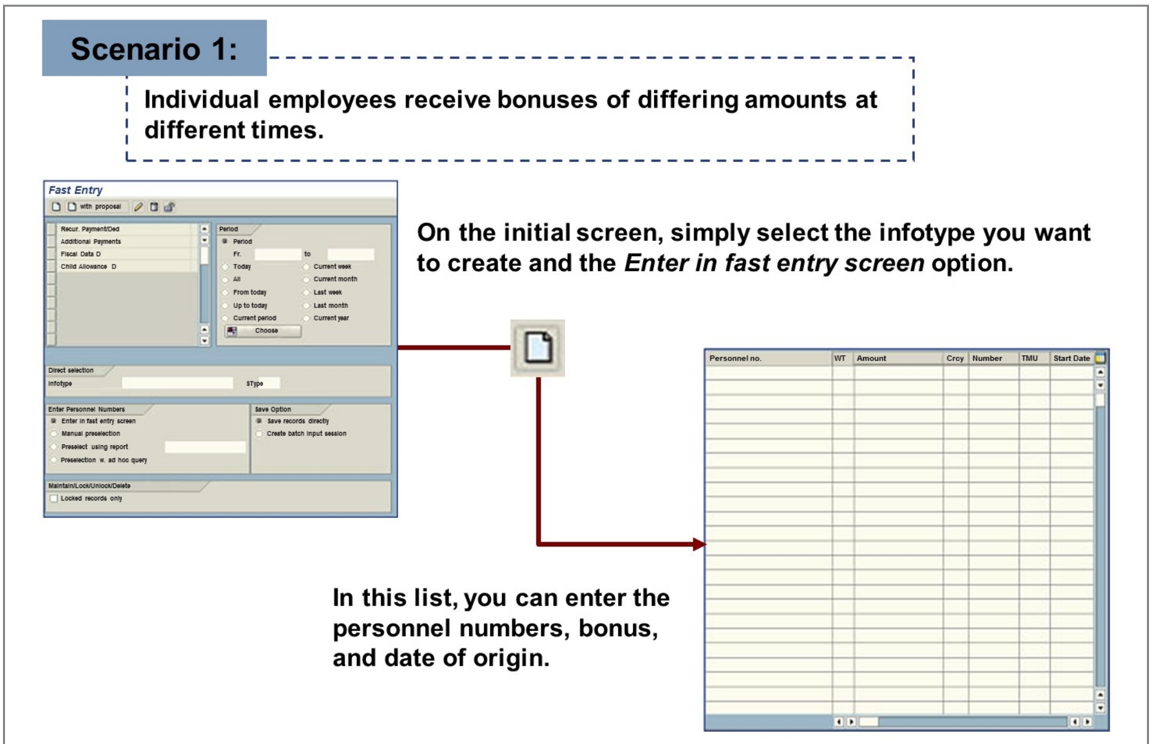

Figure 52: Fast Entry Example 1

You manually create lists of personnel numbers or use a report in accordance with predetermined selection criteria.

The use of default values reduces the time required to enter data. You can overwrite the default values on the list screen for any personnel number. The data entered is either processed immediately online, or at a later date as a batch input session.

Fast entry enables you to enter infotype data (for example, additional payments) for several employees.

LESSON SUMMARY

You should now be able to:

- Identify the characteristics of infotypes
- Create an infotype record for an employee
- Execute fast entry to update infotype records

Unit 3
Lesson 2

Executing Personnel Actions

LESSON OVERVIEW

This lesson shows you how to update employee information using a personnel action.

Business Example

As a Human Resources Administrator, you are responsible for the maintenance of employee information and must be able to update existing and create new data records. For this reason, you require the following information:

- A good understanding of required employee information

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Complete a series of infotypes for an employee using an action

Employee Hiring Action

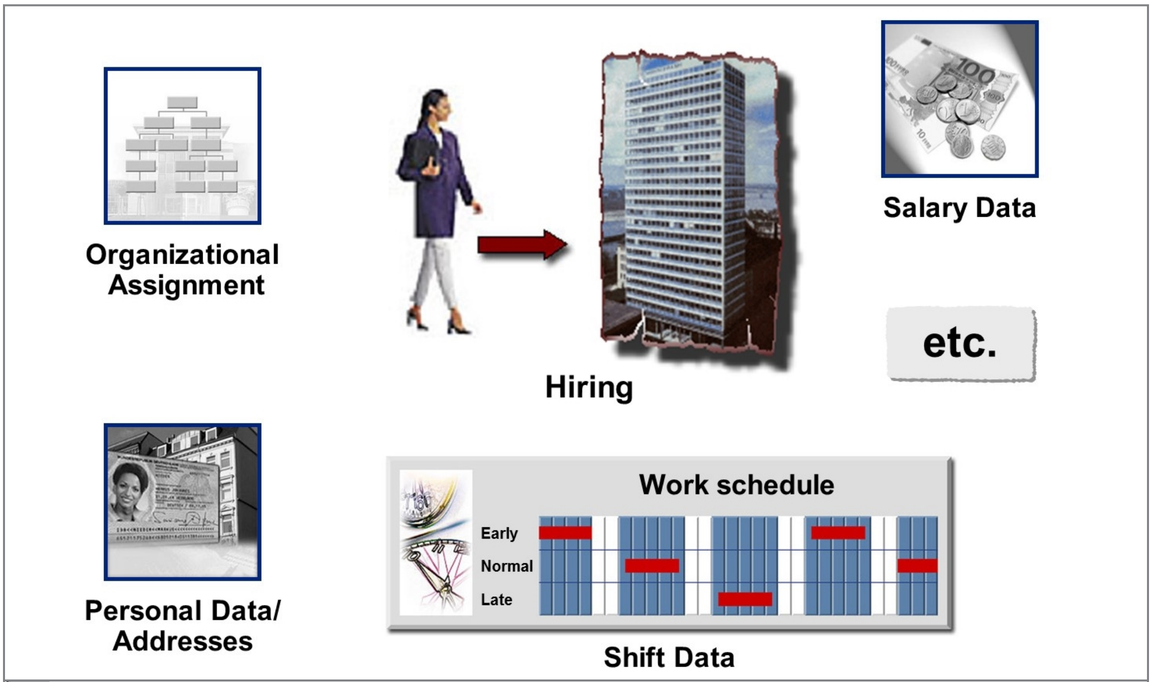

Figure 53: Hiring An Employee

The objective of master data administration in Human Resources is to enter and maintain employee-related data for administrative, time-recording, and payroll purposes.

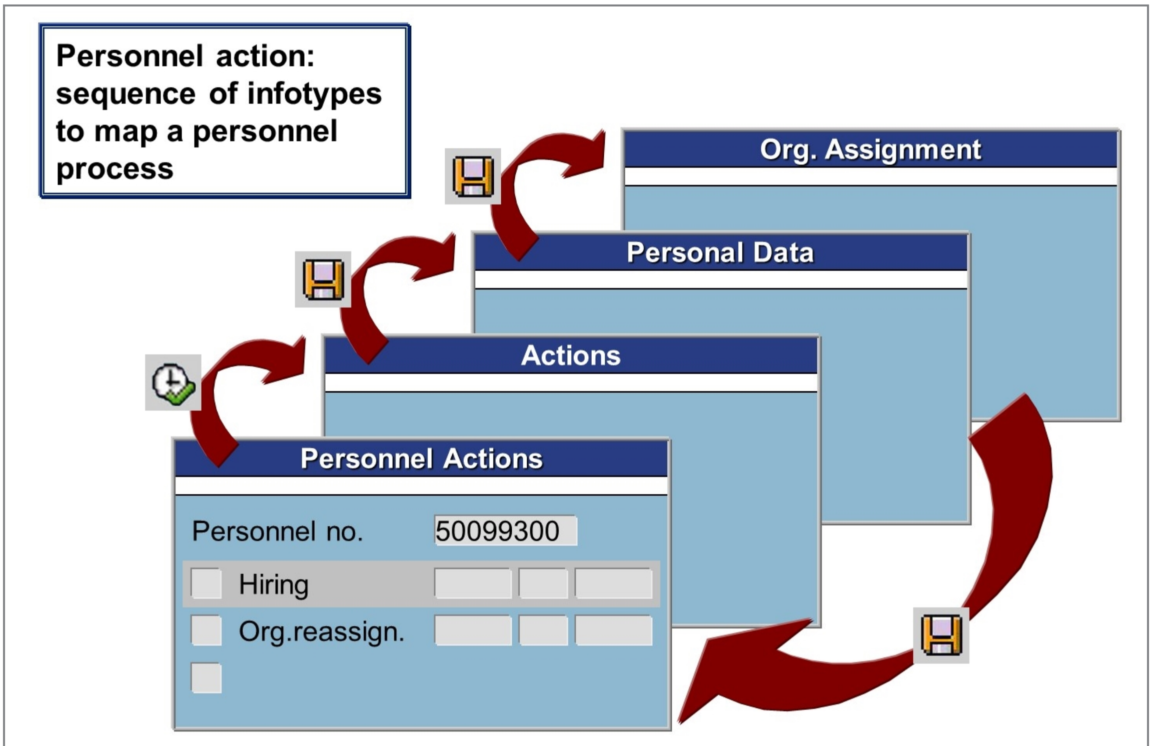

Figure 54: Hiring Action

When an employee is hired, you enter the required information into the system by executing a hiring action. A hiring action presents infotypes in the order specified by configuration to the HR administrator for completion. After each infotype is saved, the next one in the action is presented for completion. You may skip a presented infotype and, if required, complete the data at a later time.

Hint:
You can adjust personnel actions in Customizing to meet your requirements.

Figure 55: Entry Screens for Hiring

Data is recorded for these infotypes during the hiring action. In addition, country-specific infotypes such as taxes and benefits are usually included in the action.

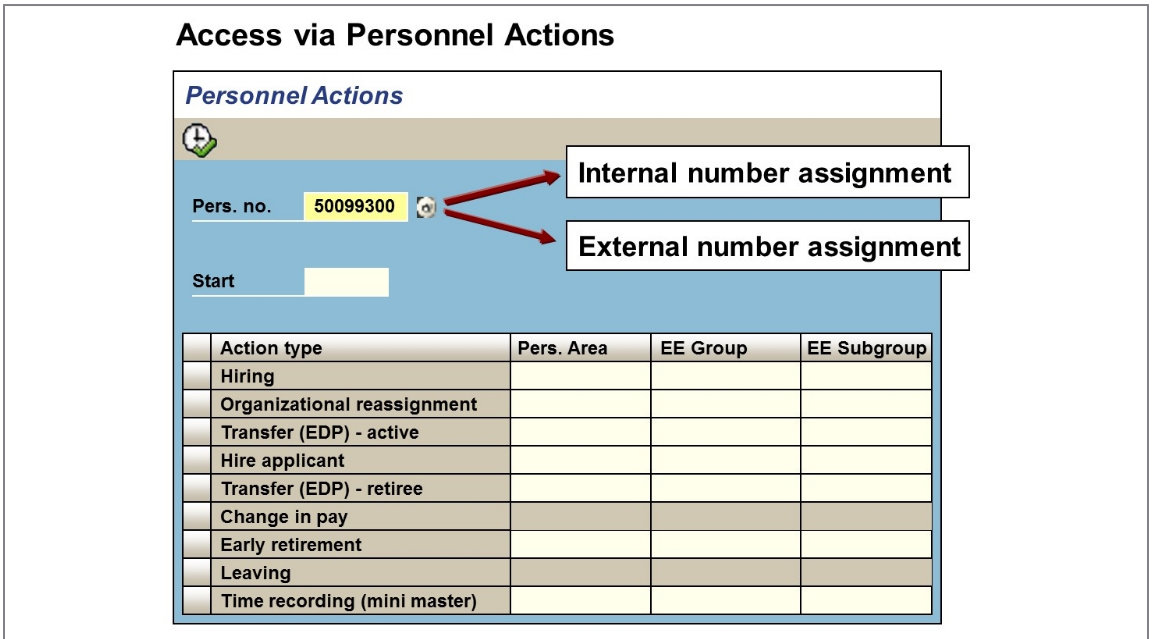

Figure 56: Hiring: Initial Screen

Personnel actions are accessed using transaction code PA40. When called, a table of all available actions is presented. To hire an employee, choose the hiring action and enter the employee's start date.

With internal number assignment, the system displays the next available personnel number. With external number assignment, you enter a personnel number that has not yet been assigned.

On the initial screen, you can enter the personnel area, employee group, and employee subgroup of the new employee. Alternatively, you may execute this screen and enter this information on the next screen which is the Actions Infotype 0000.

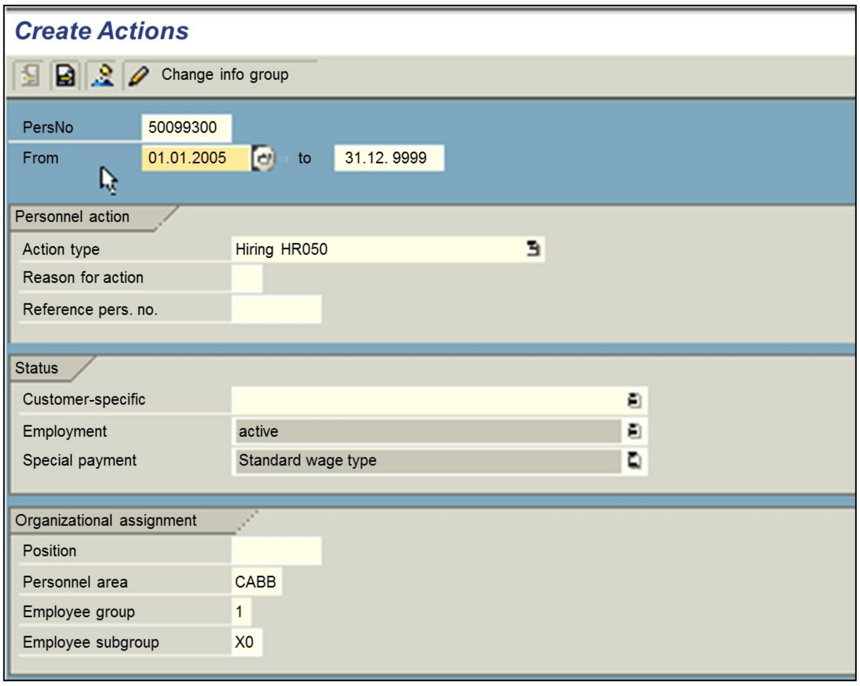

Figure 57: Actions

The Actions infotype is the first of the personnel action infotypes and it logs the personnel action. Additional information which may be recorded on this infotype include the reason for the action and a reference personnel number (if the person has more than one type of employment relationship with in the company). The status indicators are assigned by the system and cannot be manually maintained.

You can directly assign the person to a position. If you have integration between personnel administration and organizational management, and have stored information on the position (such as personnel area, employee group, and employee subgroup), the system will suggest these as default values. If integration is not active or you have not stored relevant information on the position, these values may be manually maintained.

Hint:
The Actions infotype is a prerequisite to the Organizational Assignment infotype (0001). You must save the Actions infotype. The values stored in this infotype are copied to the Organizational Assignment infotype. You cannot maintain the values there (except for in the Position field).

Once you have completed and saved the actions infotype, the remaining infotypes are presented for completion in the order specified in customizing.

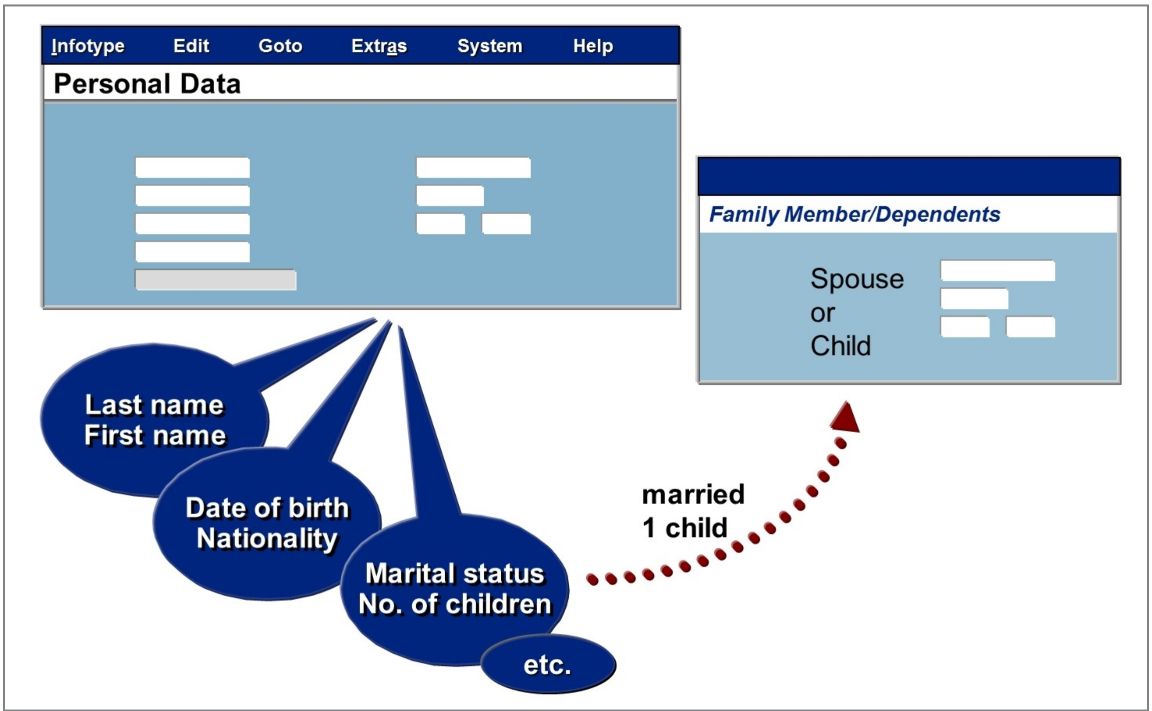

Figure 58: Personal Data

The Personal Data infotype (0002) stores an employee's personal details. This includes the employee's name, nationality, birth date, and marital status. Depending on the country in which the employee is employed, the infotype uses different screens, which are, in part, country-specific.

Dynamic actions are performed automatically by the system when specific conditions are met. For example, dynamic actions are set up on the Personal Data infotype (0002) to facilitate data entry. Based on entries in specific fields of this infotype, the system will present additional infotypes to ensure complete information is stored.

Examples of infotypes dynamically called from the Personal Data infotype 0002 include the following:

Field Completed on Personal Data Infotype 0002	Infotype Dynamically Presented	Data Included
Marital Status	Family Member/Dependents infotype 0021, subtype 1 Spouse	Information regarding the spouse
No. of Children	Family Member/Dependents infotype 0021, subtype 2 Child	Information regarding the child/children

If the employee's status is indicated as married on this infotype, the system automatically displays the Family Member/Dependents infotype (0021), which stores information on the spouse of the employee using the subtype 1.

If you indicate the employee has a child (or children) on the Personal Data infotype, the system automatically displays the Family Member/Dependents infotype (0021), which stores information on children using the subtype 2.

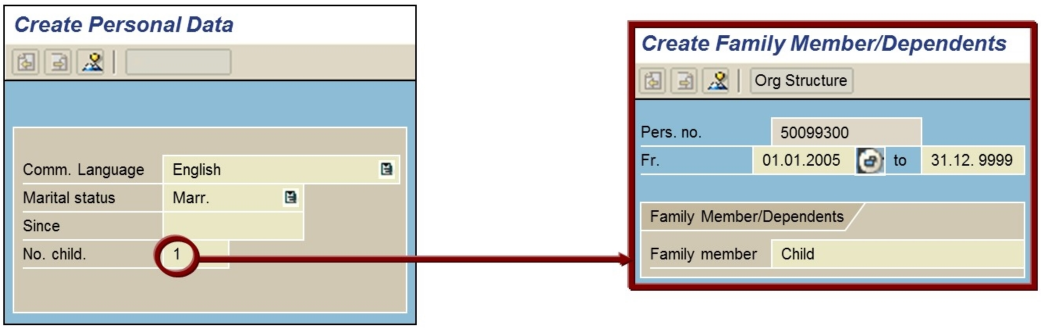

Figure 59: Dynamic Actions

Another example of a dynamic action is as follows:

- When you hire an employee, you enter the probationary period in the Contract Elements infotype. After you have saved this information, the system automatically displays a record from the Monitoring of Tasks (0019) infotype and the subtype Expiry of probation (1) for processing.

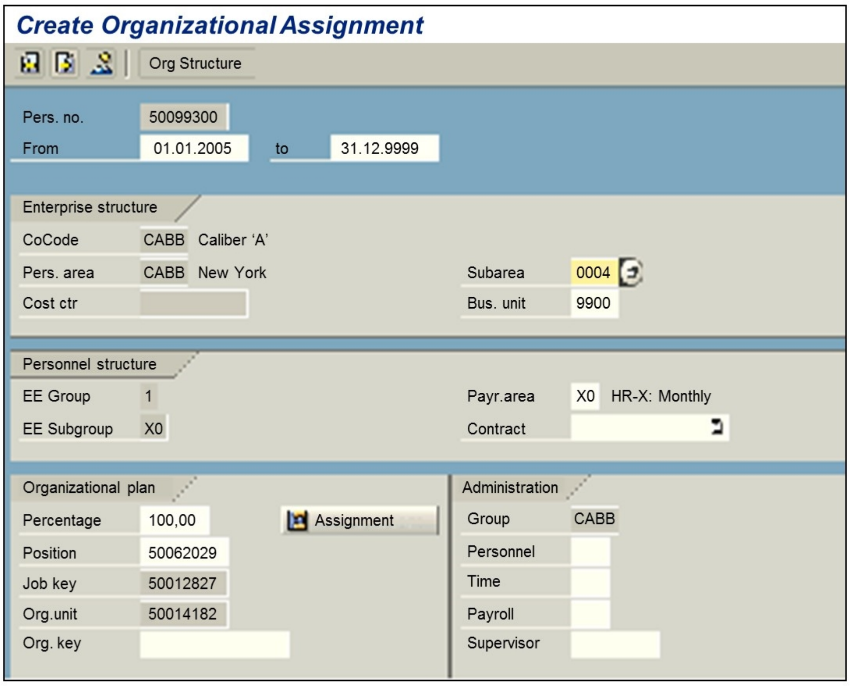

Figure 60: Organizational Assignment

Upon saving the Personal Data infotype (0002), the system automatically displays the next infotype according to customizing which, in our example, is the Organizational Assignment infotype (0001).

The following fields are filled by the organizational assignment:

- Company Code
- Personnel Area
- Personnel Subarea

- Business Area
- Employee Group
- Employee Subgroup

You can enter missing data such as position information if it was not entered earlier.

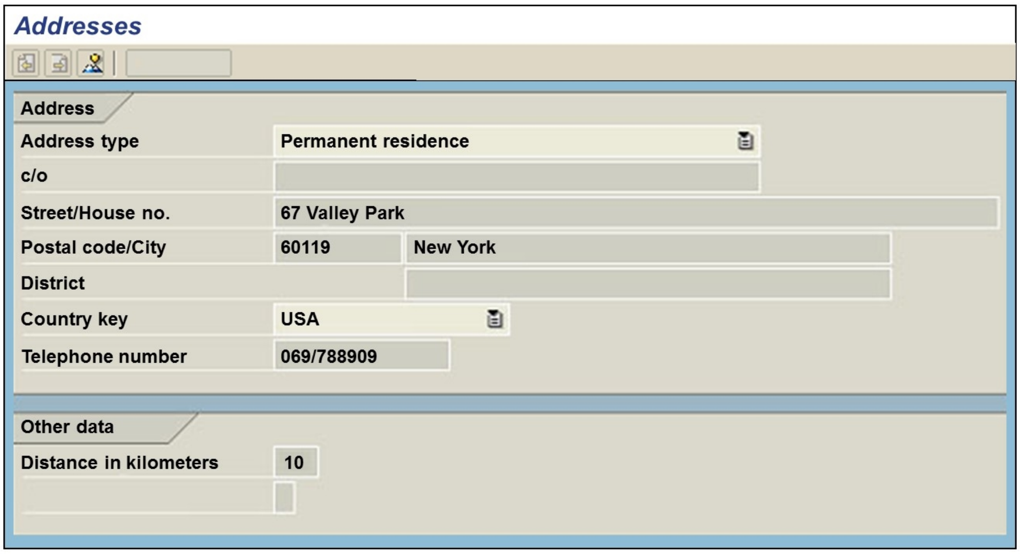

Figure 61: Addresses

You can store an employee's address in the Addresses infotype (0006). An employee's address is often used together with the employee's name from the Personal Data infotype (0002) in various employee lists, forms, or for address labels.

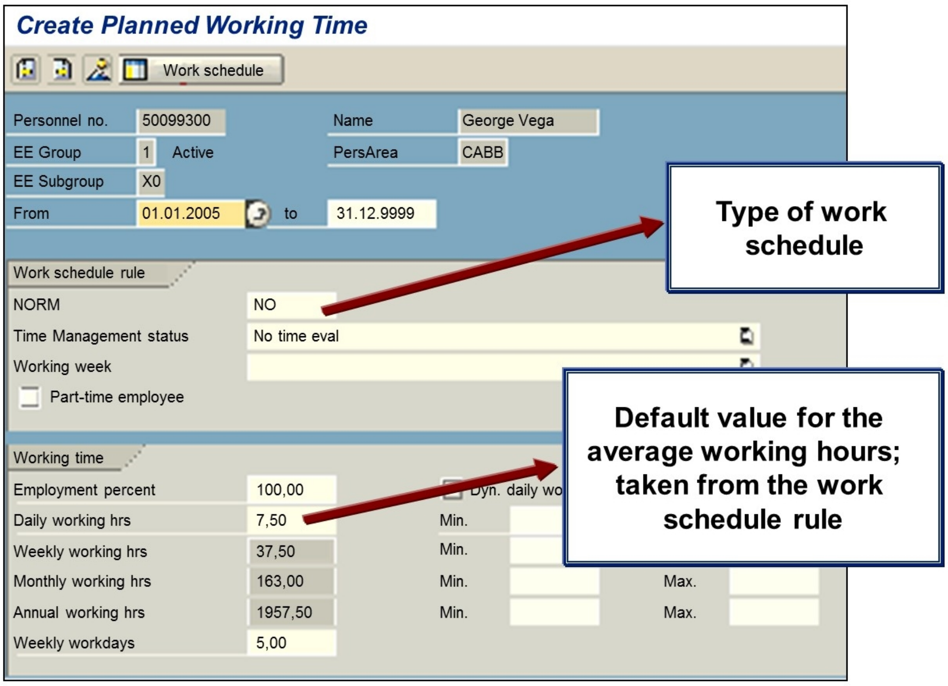

Figure 62: Planned Working Time

In the Planned Working Time infotype (0007), specify the employee's work schedule rule. This defines the employees daily, weekly, monthly, and annual working times. In addition, you specify whether the employee's time postings are evaluated and whether the employee works part-time.

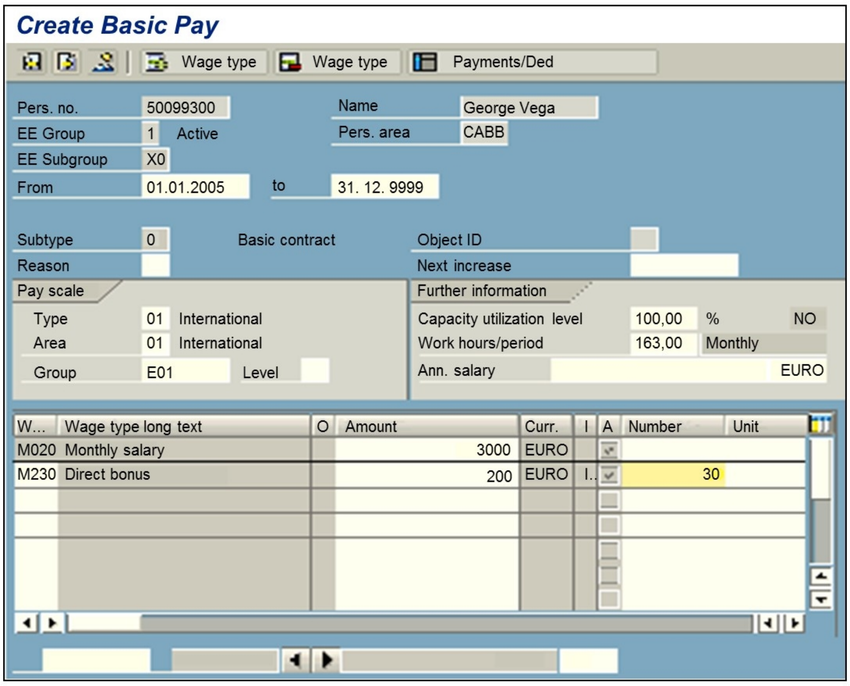

Figure 63: Basic pay

You store the employee's basic pay in the Basic Pay infotype (0008). Default values can be specified for pay scale type and pay scale area in this infotype based on customizing. When you enter the pay scale group (and possibly a pay scale level), the system calculates the employee's salary using the default values or the values entered by you.

In the Bank Details infotype (0009), you enter the employee's bank key and account number. The system suggests the employee as the default value for Payee.

You store leave entitlements in the Absence Quotas infotype (2006). You also store the deduction from and deduction to dates here. You can use the default dates suggested by the system.

Hint:
Once you save the last infotype in a personnel action, the system displays the initial screen of the personnel action.

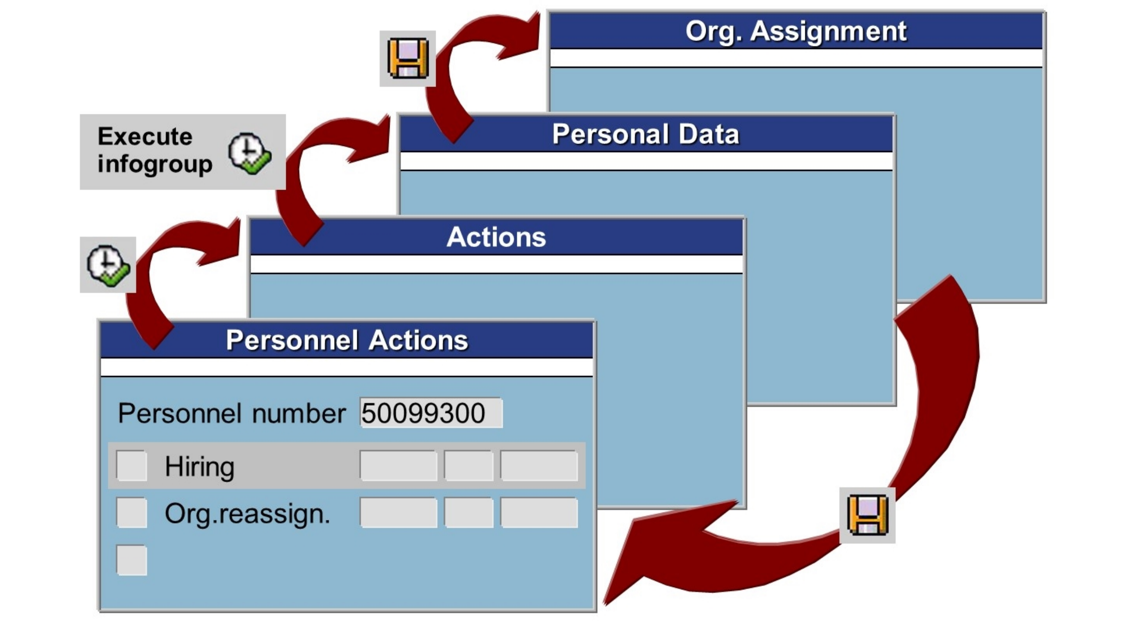

Figure 64: Restarting a Personnel Action

You can restart an executed personnel action by selecting the action on the Personnel Actions screen. Actions infotype (0000) is displayed and you must choose Execute infogroup. This re-activates the execution of the action and the sequence of infotypes assigned to the action is presented and you can make required changes. You must save each record that you change. If you do not make any changes, you can go to the next record without saving.

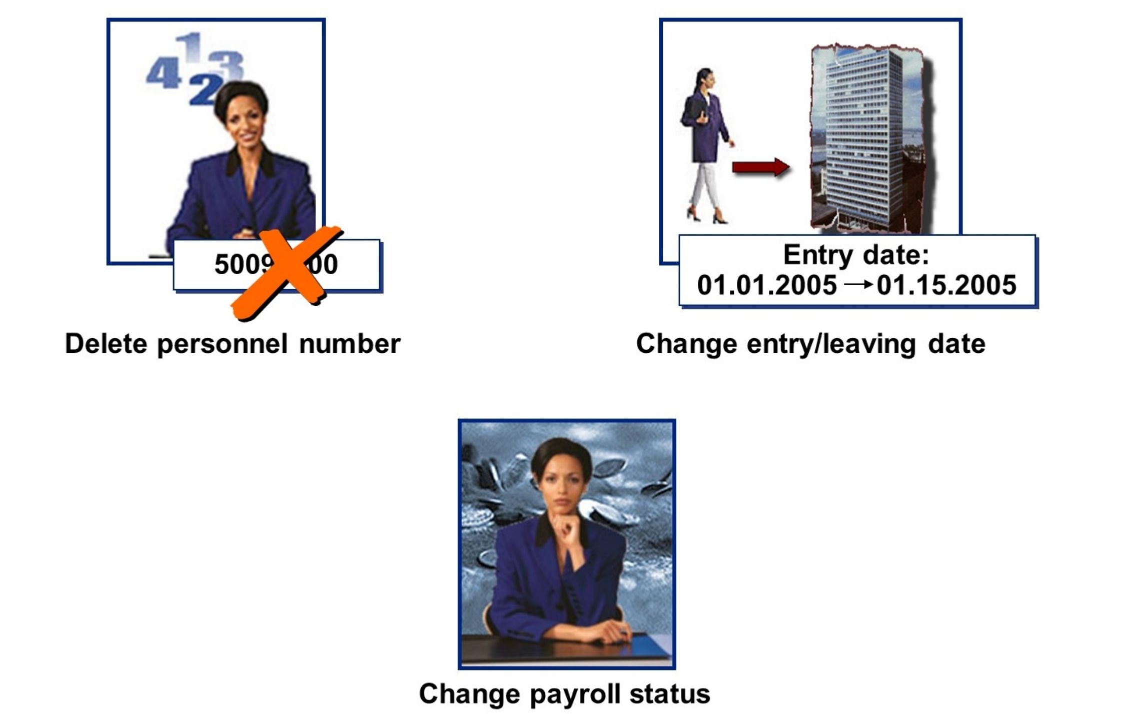

Figure 65: Utilities in Master Data Maintenance

From the Maintain HR Master Data screen, under the main menu bar option Utilities, the following options are available:

Delete Personnel Number:

Enables you to delete personnel numbers from the system for which payroll has not yet been performed.

Change Payroll Status:

Enables you to manually change the Payroll Status infotype (0003). The Payroll Status Infotype is automatically maintained by the system. Selecting this option enables you to manually change this infotype.

Change Entry / Leaving Date:

This enables you to change the start date and end date of all infotypes included in the Hiring Action simultaneously.

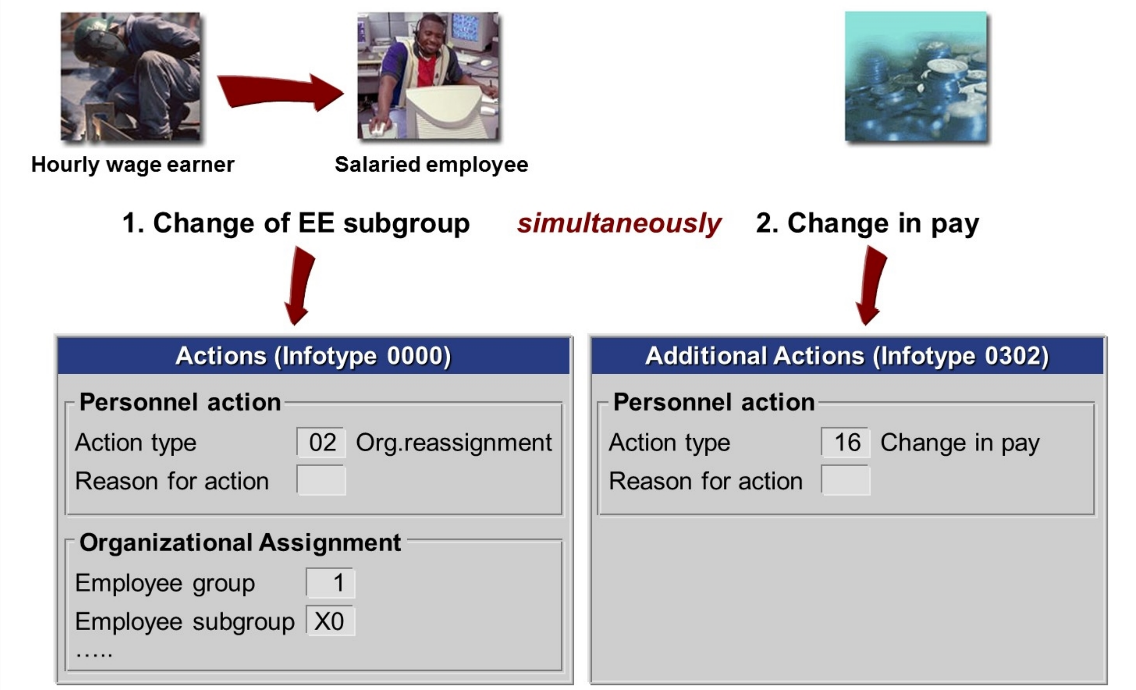

Figure 66: Additional actions

The Additional Actions infotype (0302) enables you to log all personnel actions performed for one employee on the same day. The log includes all of the action types and action reasons performed for an employee on specific dates. This means that you can save more than one data record per day for this infotype.

SAP recommends that you use the Additional Actions infotype to store an action which processes more than one infotype in a single infogroup. This is due to the time constraint 1 assigned to the Actions Infotype (0000) which means only one actions infotype may exist in the system for the same period of time. An example of this type of personnel action is Pay Change. All of the programs that interpret an employee's status evaluate the Actions infotype (0000) only.

LESSON SUMMARY

You should now be able to:

- Complete a series of infotypes for an employee using an action

Maintaining Employee Data Using SAP NetWeaver Business Client (NWBC)

LESSON OVERVIEW

This lesson shows you how to maintain employee data using SAP NetWeaver Business Client.

Business Example

As a Human Resources Administrator, you are responsible for the maintenance of employee information and must be able to update existing and create new data records. For this reason, you require the following information:

- A good understanding of how to find employee information
- A basic understanding of how to maintain employee information using self-services

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Maintain employee data using SAP NetWeaver Business Client

SAP NetWeaver Business Client

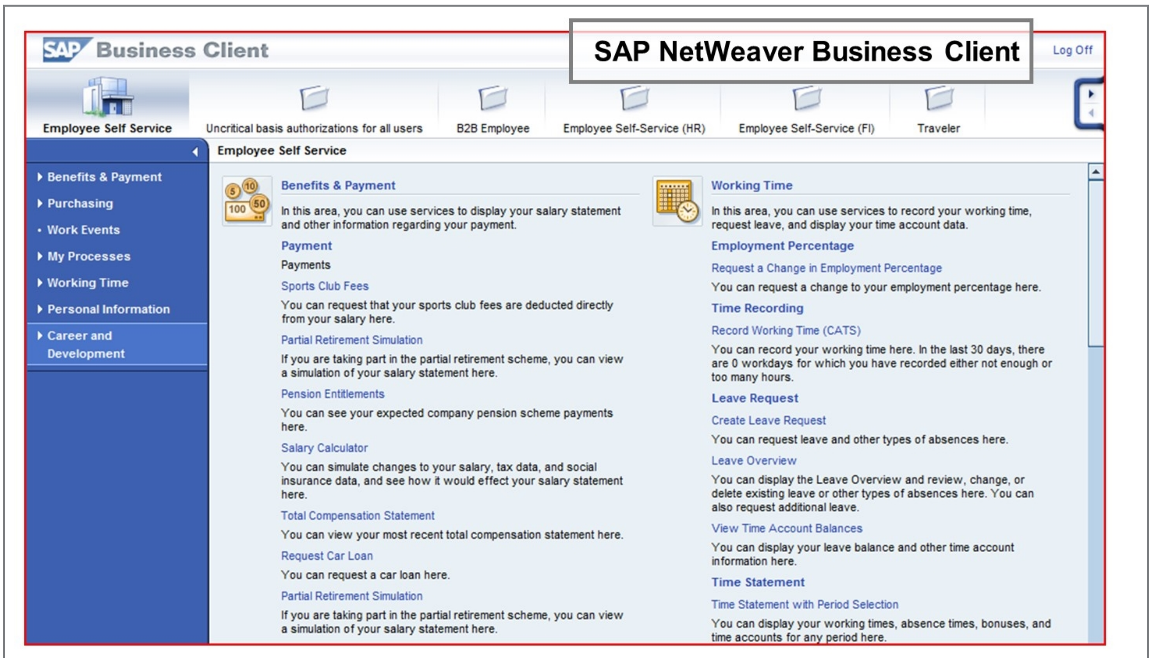

Figure 67: SAP NWBC:- A Harmonized Look and Feel

SAP NetWeaver Business Client (NWBC) is new as of enhancement package 5. NWBC allows customers to implement employee self- services or manager self-services without using a

portal. The look and feel of the NWBC screens are very similar to those displayed using a portal.

The SAP NetWeaver Business Client (NWBC) offers a unified environment for, and a single point of entry to SAP applications. The SAP NetWeaver Business Client is an environment that hosts SAP GUIs to provide a unified environment with a more efficient, intuitive and complete user experience. Within the SAP NetWeaver Business Client you can move seamlessly between Web Dynpro and SAP GUI transactions. For SAP GUI to run within the SAP NetWeaver Business Client, SAP GUI must be installed (as part of the SAP NetWeaver Business Client installation or separately).

SAP NWBC offers a solution for hosting following:

- Classical dynpros (SAP GUI UIs)
- Web Dynpro applications
- BSP (Business Server Pages) pages
- Portal pages

You can use the SAP NWBC either with or without the portal depending on whether you want to access ABAP (Advanced Business Application Programming) back ends directly or not. NWBC runs on Windows XP and Windows Vista. The installation of NWBC is straightforward. It uses SAP setup just like SAP GUI.

The SAP NWBC also supports generic desktop functions, like drag and drop, popup windows, and so on, through the utilization of the corresponding APIs (Application Programming Interface). The result is an efficient, modern and attractive client environment.

Benefits of SAP NetWeaver Business Client includes the following:

- There is a single point of entry for SAP GUI applications and Web Dynpro applications.
- New Web Dynpro applications including POWER Lists improve functionality and usability.
- Desktop integration gives user the potential to leverage everything on the desktop.
- There is powerful search functionality including desktop search and using external search engines.
- The smart client improves the performance of Web Dynpro applications
- Low training effort due to familiar look and feel
- The state-of-the-art UI (User Interface) more than matches the quality of the competition and it has distinctive SAP branding.

Main Elements of SAP NetWeaver Business Client

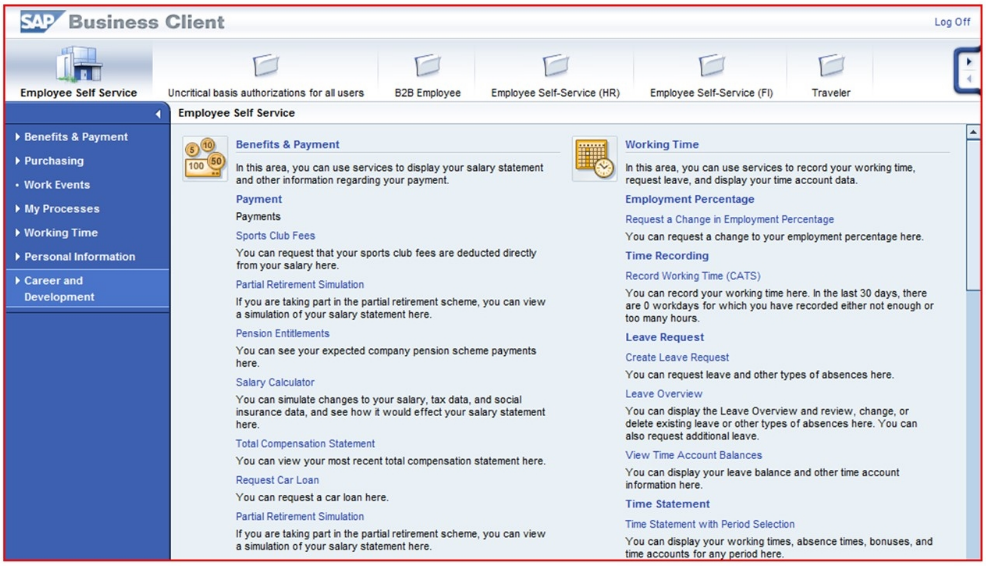

Figure 68: Employee Self Service using NWBC

The navigation section on the left side of the screen allows quick and easy access to various employee services. Alternatively, the employee may select the required service by clicking on the link in the middle (canvas) section of the screen.

The main elements of SAP NetWeaver Business Client are as follows:

Shell:

The shell is the frame consisting of the horizontal bar above and the vertical bar to the left of the canvas. It provides a wide range of functions such as role-based navigation, search functions, help, desktop integration, menus, branding, scripting, caching, and so on.

Canvas:

The canvas is the area that hosts the applications. It provides a unified environment with embedded rendering engines for the different types of applications.

All standard applications can run in the canvas including the following:

- Web Dynpro for ABAP
- Web Dynpro for Java
- SAP GUI applications
- Business Warehouse reports
- Flex content
- Adobe Forms

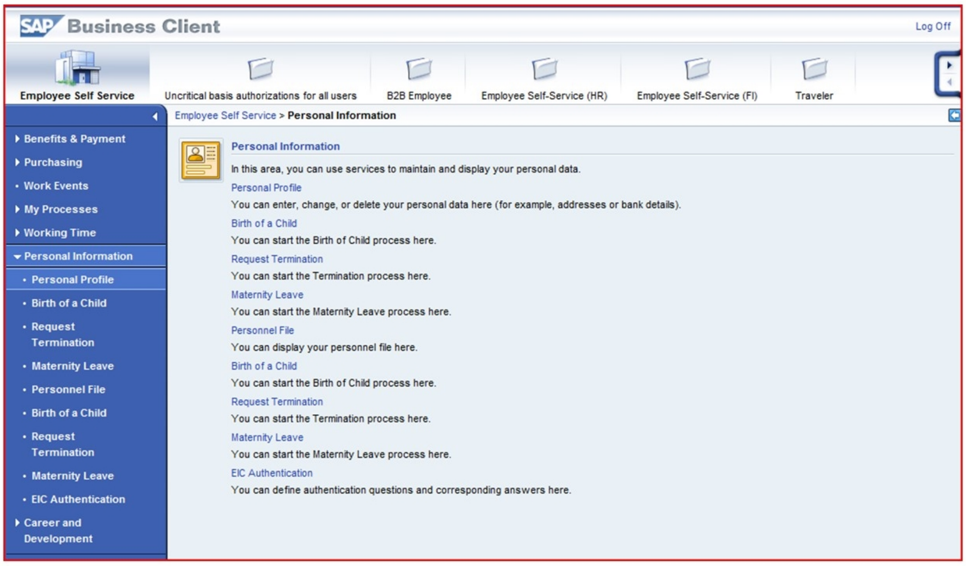

Figure 69: NWBC - Personal Information

Using NWBC employee self-services, an employee could select Personal Information and have the ability to view, edit, create and update information such as their address or bank details or adjusting the dependents covered under their benefit plan.

Various other roles have the ability to find and update information using NWBC.

SAP NetWeaver Business Client roles include the following:

- Employee Self-Service
- Manager Self-Service
- Recruiter
- Learning Solution Learner
- Talent Consultant
- Decision Maker

LESSON SUMMARY

You should now be able to:

- Maintain employee data using SAP NetWeaver Business Client

Learning Assessment

1. The HR System stores all data for an employee in infotype records. Several records can be added to an infotype for an employee.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. The personnel actions make it possible for an employee to implement several infotypes in a predefined sequence.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. The HR System stores all data for an employee in infotype records. Several records can be added to an infotype for an employee.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

   Correct. Different records can be entered using the validity period, for example, when changing the address data of the employee.

2. The personnel actions make it possible for an employee to implement several infotypes in a predefined sequence.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

   Correct. Examples would be the hiring action or organizational reassignment.

UNIT 4 SAP E-Recruiting

UNIT OBJECTIVES

- Create a requisition to start the recruitment process
- Register an external candidate for a vacant position
- Determine talent information in the Talent Warehouse
- Determine SAP E-Recruiting reporting options

Unit 4
Lesson 1

Recruiting New Employees

LESSON OVERVIEW

This lesson shows you how to start the recruitment process by creating a requisition.

Business Example

As a Human Resources Business Partner responsible for recruiting, you must be able to utilize the SAP E-Recruiting solution to initiate the recruitment process. For this reason, you require the following knowledge:

- A good understanding of the SAP E-Recruiting solution
- A good understanding of the requisition requirements

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a requisition to start the recruitment process

SAP E-Recruiting Overview

SAP E-Recruiting includes the mapping of processes to enable you to execute workforce planning requirements, post vacancies, hire applicants, and maintain long-term relationships with candidates in your applicant pool. The E-Recruiting solution is fully Internet-enabled and includes clearly defined processes to enable you to recruit efficiently and effectively.

Processes in SAP E-Recruiting include the following:

Requisition Management

- Agreement between HR managers and recruiters regarding how recruitment for a position is to be handled.
- Specification of how candidates are to be ranked and selected for a particular position in a structured manner
- Specification of when candidates are to be selected and ranked

Management of Job Postings

- Definition and implementation of a strategy to attract candidates to your company in general or to a particular position
- Enable you to search in talent pools and publications

Entry of Applications

- Acceptance of incoming applications through various channel such as e-mail, intranet, Internet, third parties, job fairs, special recruitment events

Application Management / Applicant Tracking

- Carry our applicant screening and selection processes
- Prepare offer letters and employment contracts
- Use of process templates which consist of a series of process steps to which activities are assigned (for example, invite to interview or reject applicant). When a process template is linked with a requisition, the recruiter is guided through the Applicant Tracking process.

Talent Relationship Management

- Establish and maintain long-term relationships with potential candidates
- Perform segmentation of candidates
- Manage candidate activities such as keeping track of number of interviews completed and their results, ranking results, and assessment testing results
- Allow candidates options to determine suitable jobs

Cross Processes

- Reporting
- Correspondence
- System Administration

Customizing

- Customize functions to meet your requirements

You can use SAP E-Recruiting in the following ways:

Solution Implementation	Definition
Standalone Solution	• SAP E-Recruiting and the ERP system are installed on different systems • On a second system, you are running SAP E-Recruiting and nothing else
Standalone with integration to back-end systems (HCM, BW/BI)	• SAP E-Recruiting is installed on a separate system and integrated to the ERP system (for example using Application Link Enabling distribution)
As an ERP installation	• SAP E-Recruiting is part of the ERP system

Roles in SAP E-Recruiting

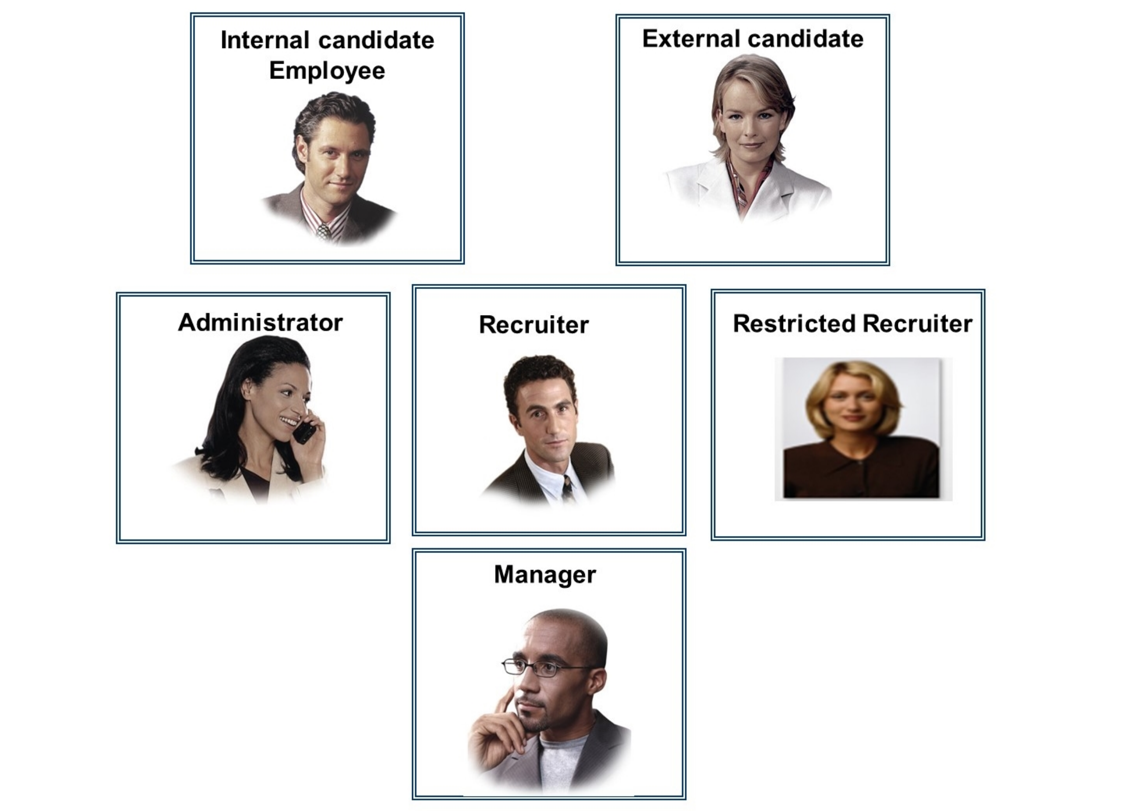

Figure 70: Roles in SAP E-Recruiting

SAP E-Recruiting has a predefined set of roles. Each of these roles has its own authorization profile and interface (portal page).

Delivered roles include the following:

Role	Responsibilities
Recruiter	Recruiting activities including the release of requisitions
Restricted Recruiter	Recruiting activities excluding the release of requisitions
Manager	Basic recruiting activities including requisition approval
Administrator	Recruiting activities plus management of some system settings
Internal Candidate	Employees
External Candidate	Individuals not associated with your organization

In addition to these roles, there are new roles available as of EhP5 using SAP NetWeaver Business Client (NWBC). NWBC is a desktop client that offers a single point of entry to SAP applications. It provides a solution for hosting classical Dynpros (SAP GUI UIs), Web Dynpro applications, BSP (Business Service Pages) pages, portal pages, and other content. You can use the SAP NWBC either with or without the portal depending on whether you want to access ABAP (Advanced Business Application Programming) back ends directly or not. These roles

contain all necessary authorizations required to use the corresponding Web Dynpro applications without using the SAP Portal. These roles drive the navigation menus for each user in the SAP NetWeaver Business Client (NWBC) for the HTML environment.

NWBC roles specifically for E-Recruiting are as follows:

- E-Recruiting Services for ESS
- E-Recruiting Services for MSS
- Recruiter NetWeaver Business Client
- Recruiting Administrator NetWeaver Business Client
- HR Administrator (New Hire Scenario)

Application processes are carried out by means of the relevant start page (Web Dynpro ABAP) and access to the start page is controlled by authorization roles in the back-end.

Manager Role

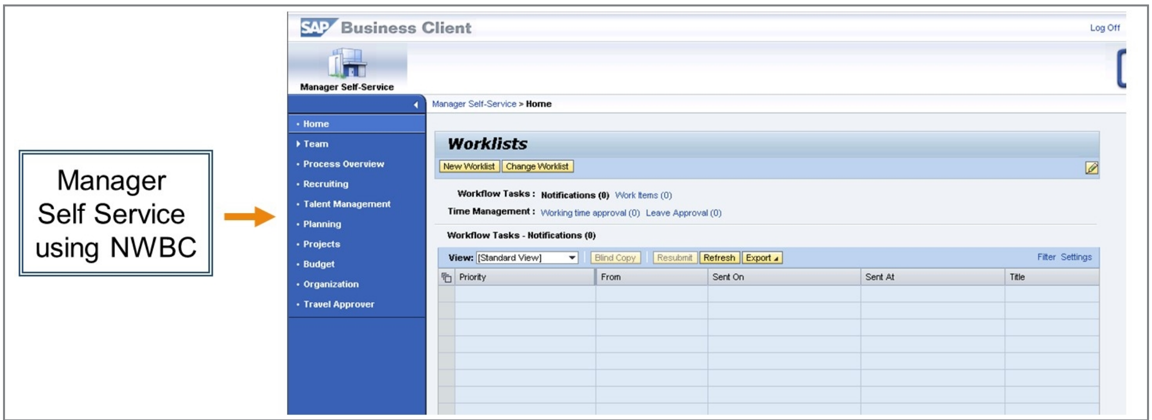

Figure 71: The Solution - Manager Self Service

Manager's Self Service (MSS) and SAP E-Recruiting can be integrated. Managers can start a requisition directly from within MSS or create a requisition request online in SAP E-Recruiting. The recruiter has follow-on actions such as creating the actual publications and postings.

The following services are provided in the MSS work area for E-Recruiting:

- Request a New Vacancy
- Status Overview
- Requisition Request
- Candidate Assessments
- Ranking Overviews

Administrator Role

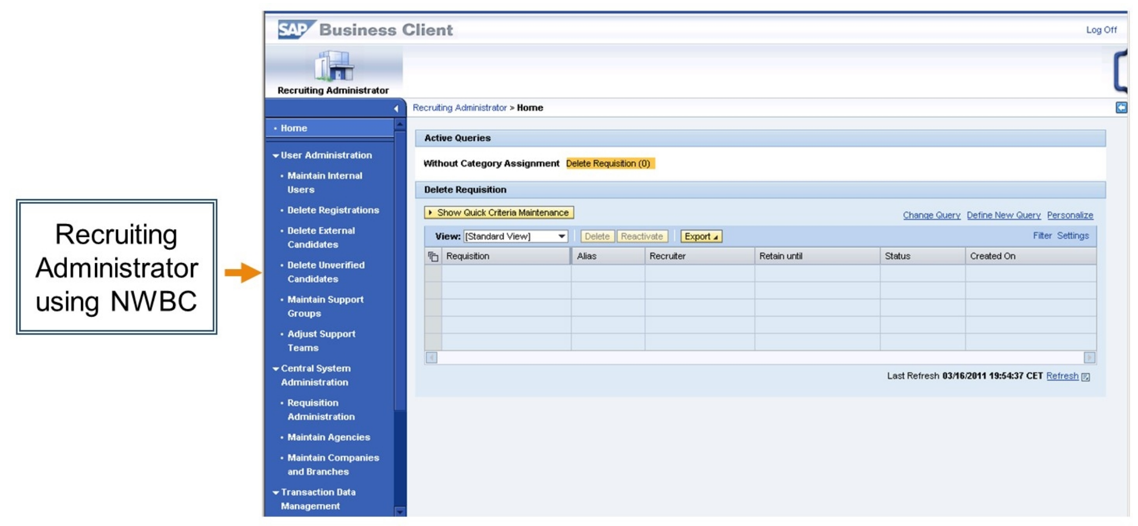

Figure 72: The Solution - Recruiting Administrator

The Recruiting administrator role (Web Dynpro ABAP) can make numerous system settings via the Web. Services available to the administrator are displayed in the Work Overview section under Services and include activities such as user management and system administration.

Candidate / Applicant

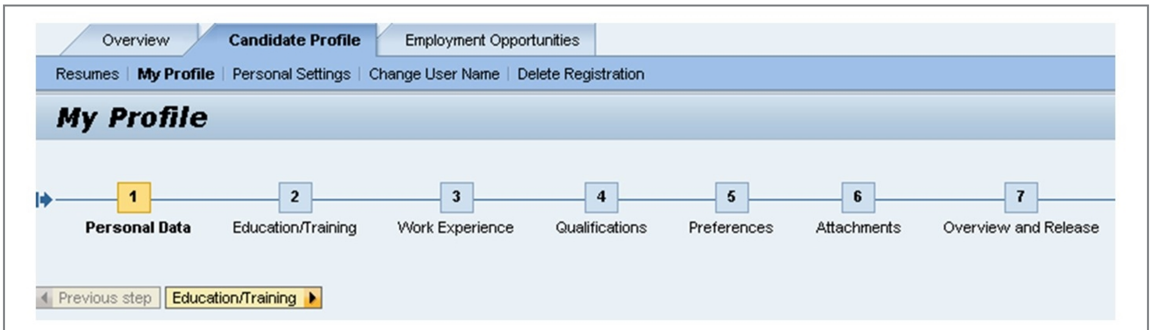

Figure 73: The Solution Candidate/Applicant

An application wizard leads candidates through the application process which includes entering information such as contact, work experience, education, qualifications, and the upload of their resume. Text Retrieval and Information Extraction (TREX) search functionality allows the recruiters to search for text fields in the uploaded documents.

Recruiter Role

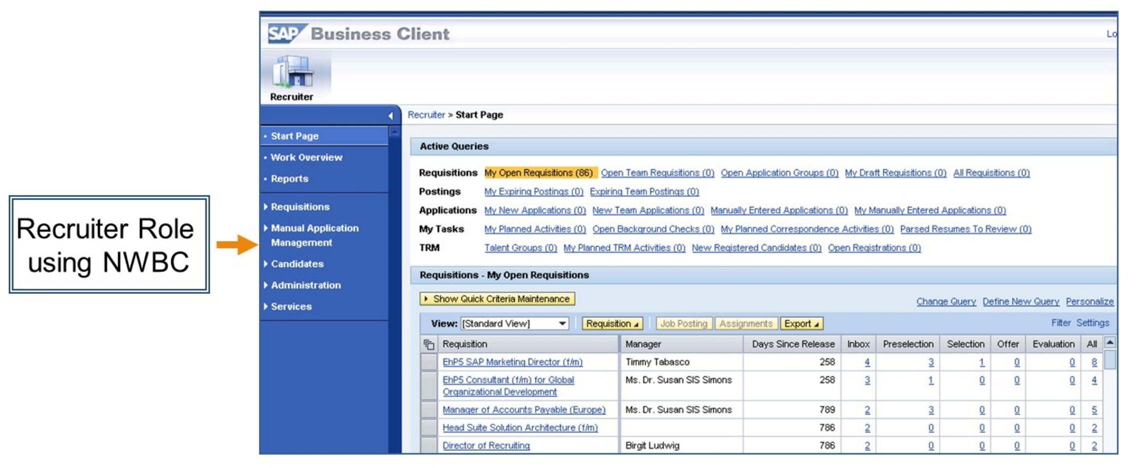

Figure 74: The Solution - Recruiter

Applicant tracking allows the recruiters to keep track of candidate activities such as phone interview, in-person interviews, interview results and correspondence generated.

Employee Role

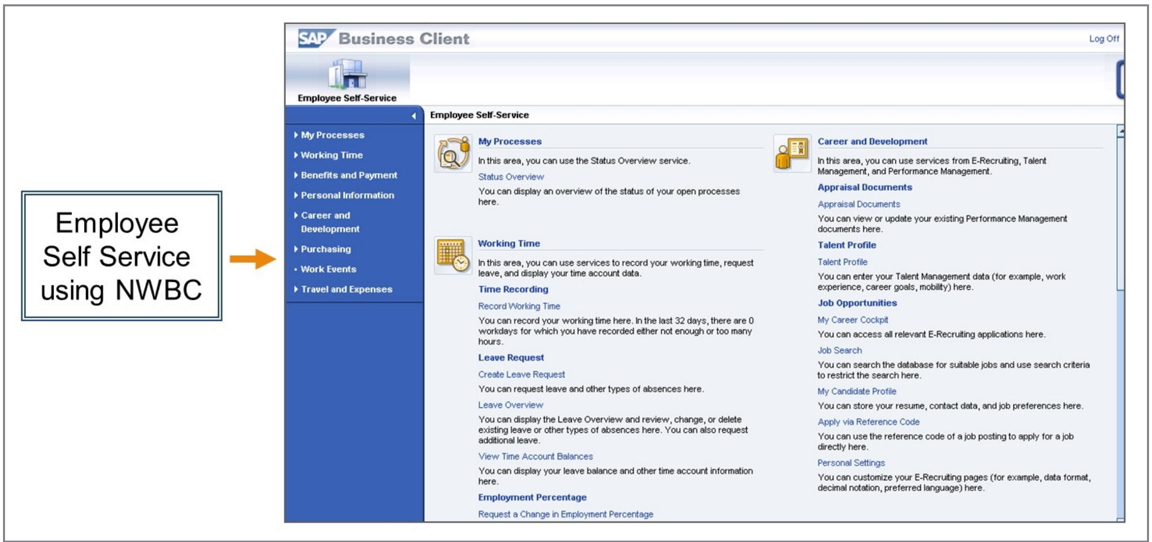

Figure 75: Employee Self Service

Employees are considered candidates when they apply for internal positions. Accessing the Career and Development section of either the Employee Self Service (ESS) portal or SAP NWBC allow employees to search and apply for internal positions.

Requisitions

A requisition is a request to fill a position and is completed by defined roles, such as a manager or recruiter, and initiates the recruitment process. Workflow can be used to ensure proper approvals are in place and Adobe Interactive Forms can be created to follow the processes defined by your organization.

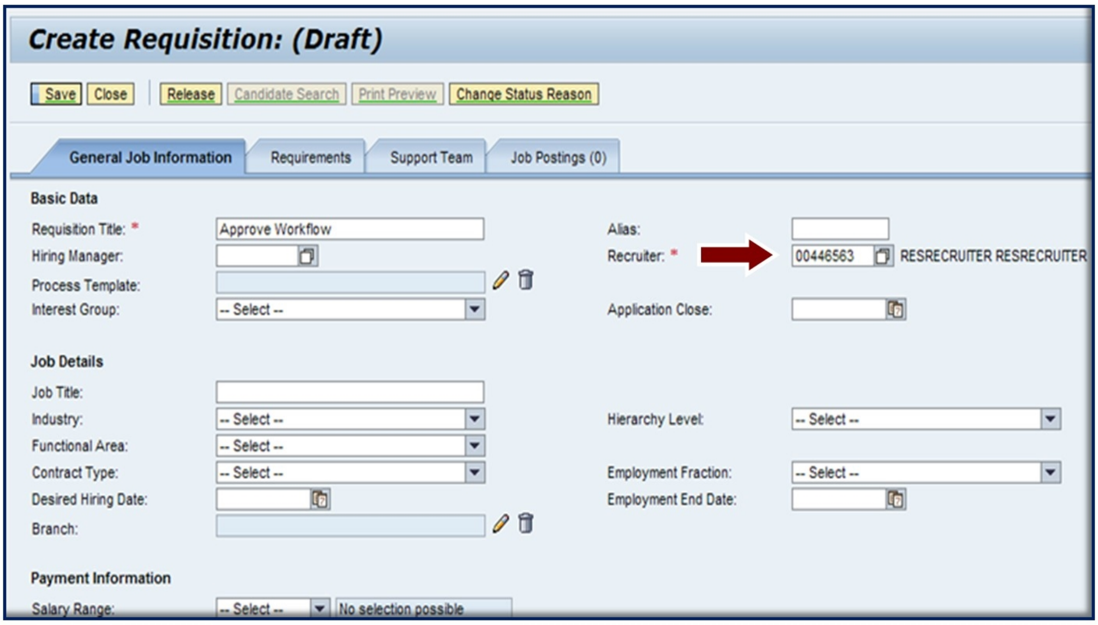

Figure 76: Creating a Requisition

SAP E-Recruiting uses process templates to structure the entire process for a requisition. A process template consists of a sequence of steps and activities and helps structure the recruitment process.

The requisition contains general job and payment information as well as requirements that candidates must fulfill to satisfy the requirement profile of the position. A requisition includes posting (text of the publication) and publication (the channels where the posting can be viewed: Web site, job board, newspaper, for example).

Note:
You cannot create a posting if the requisition has Draft status. The requisition must be in Released status to proceed with the posting.

The requisition comprises a central storage location for all information relevant for the position, such as:

Information	Examples of Detail
Support Team	• Individuals involved in the recruitment process for the vacant position
Organizational Data	• Cost center • Organizational Unit • Position
General & Specific Requirements	• Education • Work experience

Information	Examples of Detail
	• Ability to travel • Position requirements
Specifications for the Recruitment Process	• Process template including the steps to be completed, such as phone screen, first / second in person interview, obtain references, offer letter, test results • Process template to be presented to candidates • How candidates will be ranked • Questionnaires presented to candidates • Content and format of job postings • Management of publications (where postings will be displayed) • Workflow tasks

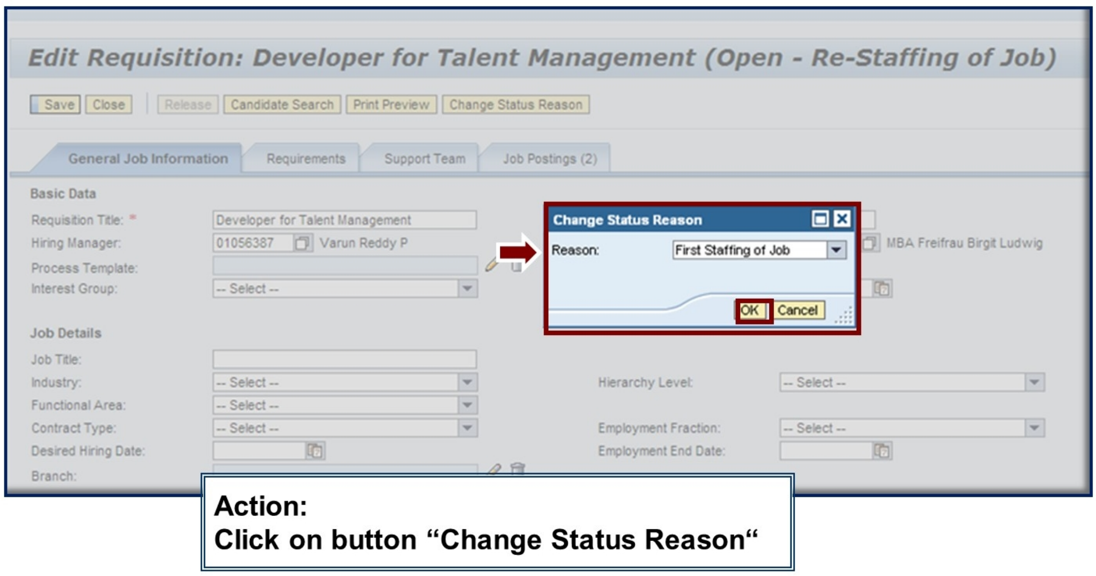

Figure 77: Requisition Management New Action Button: Change Status Reason

The new Change Status Reason button allows the person completing the requisition, such as the recruiter or manager, to enter the appropriate reason for the requisition request. Reasons are maintained in the customizing table in the implementation guide. The tracking of status changes supports the approval process steps and ensures business processes are complete. The selected change reason is displayed in the query *My Open Requisitions* in the new column *Status Reason*.

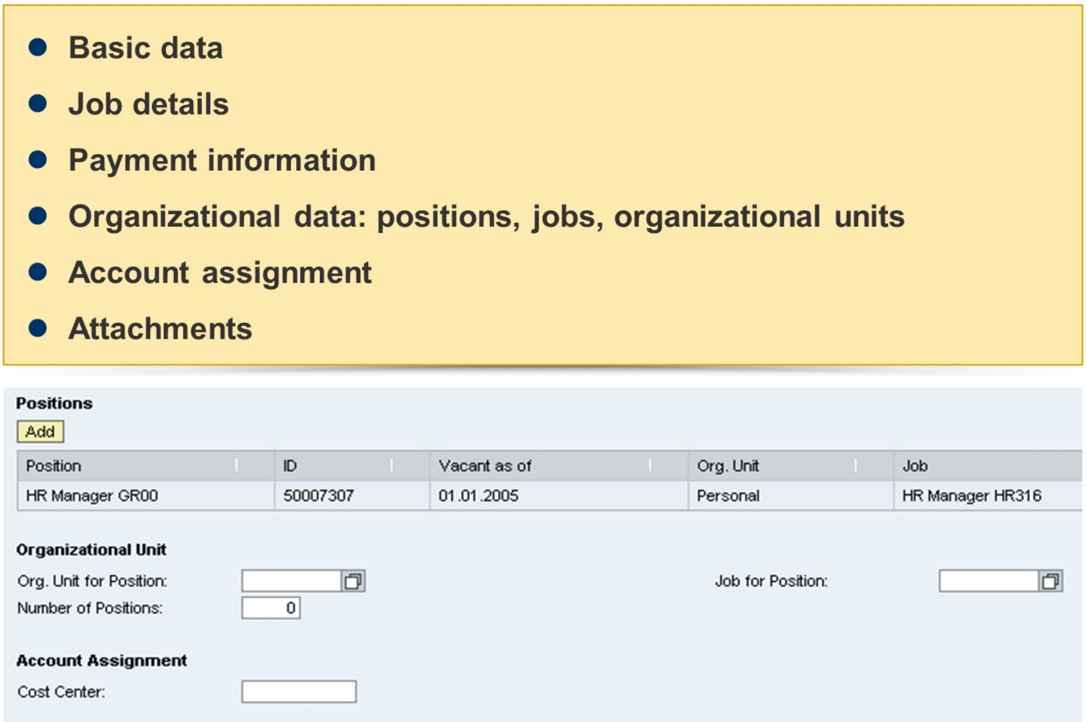

Figure 78: Requisition General Job Information

You can use the organizational structure as the basis for the requisition (organizational unit, position, job) or simply specify the number of positions. SAP E-Recruiting use process templates to structure the entire process for a give requisition. A process template consists of a sequence of steps and activities and helps structure recruitment activities.

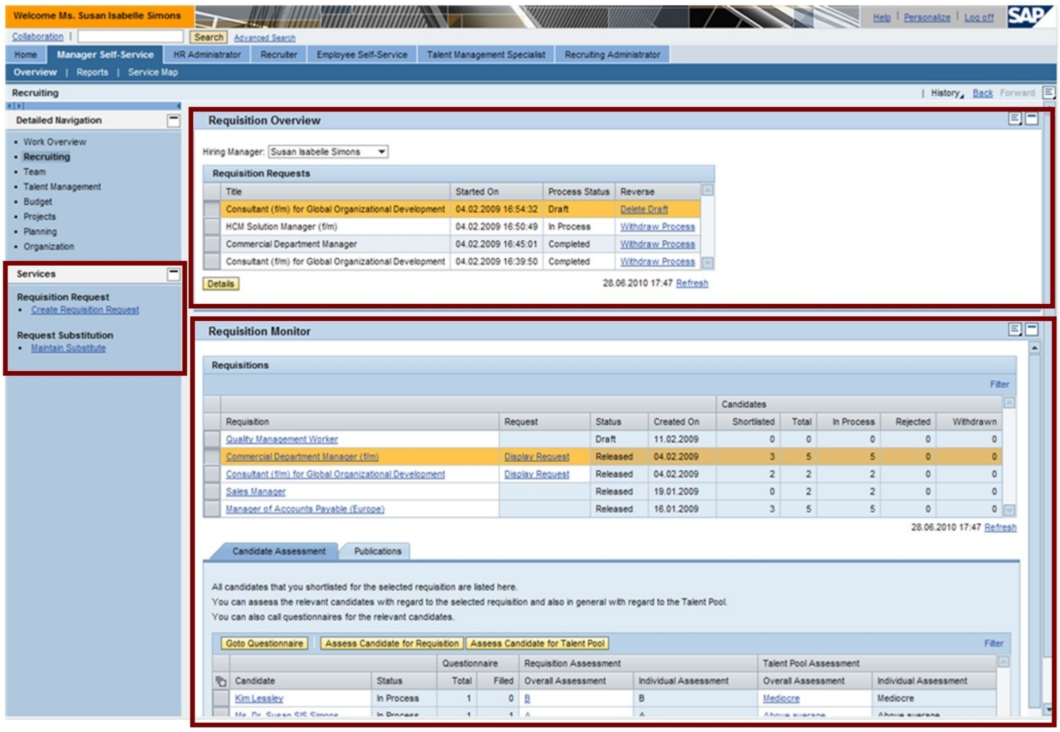

Figure 79: Requisition Request: MSS

In manager's self service, the manager has the ability to create requisitions and maintain a substitute to handle requisitions in the manager's absence, including deciding what the substitute is able to do. The manager can monitor requisition-related activities such as evaluate candidates, view requisition details, and check publications. For candidates, the manager can view candidate shortlists, profiles, and applications. The manager interacts with the recruiter to execute assessments and prepare interviews.

Requisitions must be released and an approval workflow is available to handle this process.

You must request a requisition release in the following scenarios:

- You created the requisition
- You made changes to a requisition that was already released

A link or additional information can be provided for each scenario.

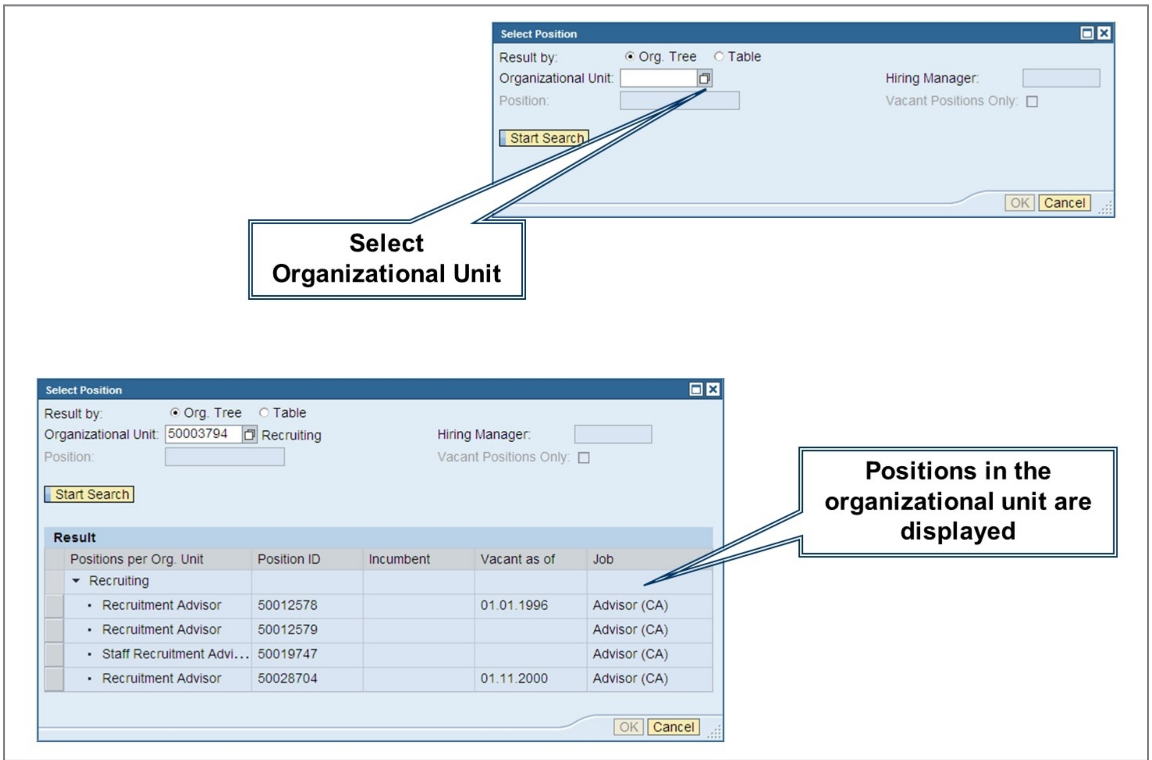

Figure 80: Requisition Request Find Position

To initiate the recruitment process, the manager fills out a requisition request form which is sent to the next processor using workflow.

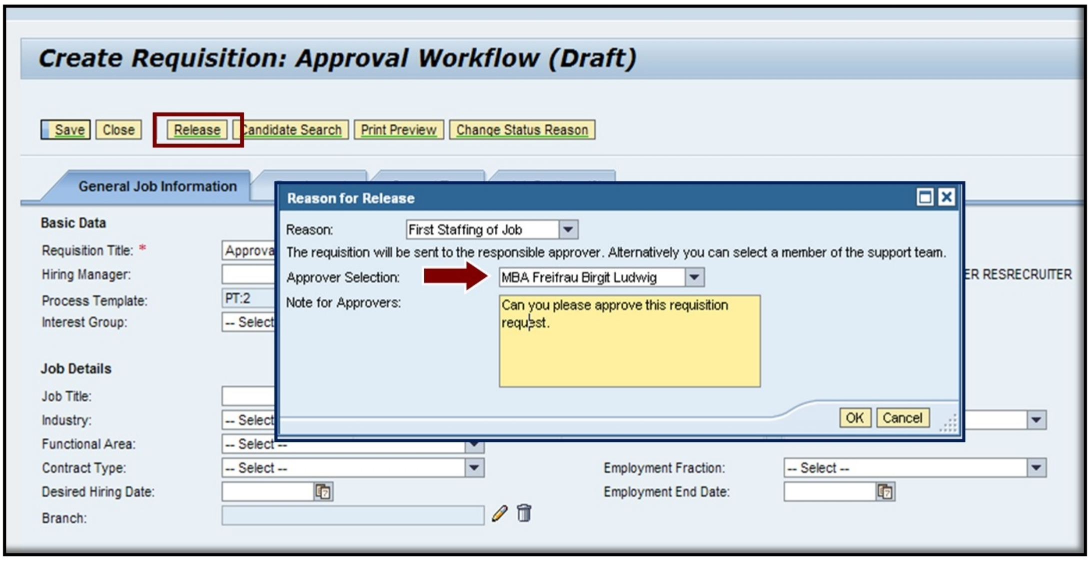

Figure 81: Requisition Approval - Request Release via Approval Workflow

Info: On the dropdown for possible approver, all users with authorizations are listed

- Notice that the restricted recruiter is not on the list
- Select an approver and press button ‘OK’.

If a request is created based on an existing job or position, the information stored for the object is transferred. It is also possible to copy a previous requisition request. This information is copied into the new requisition. The manager can select parameters that support the creation of a requisition. The manager must fill out the required information in the form.

Once released the requisition is associated with one or more postings. A posting contains the actual text seen in the publication. A posting is associated with one or more publications, which is the channel (or location) where that posting can be found.

Job Posting

Job postings contain the detailed requirements for the position and are attached to a requisition.

Figure 82: Requisition Requirements

The following can be maintained as education requirements:

- Education Types
- Broad Field of Education
- Degree / Certificate Level
- Subject

You can add qualifications as requirements by accessing the qualification catalog. In SAP E-Recruiting, you can restrict the view of the catalog by configuration settings.

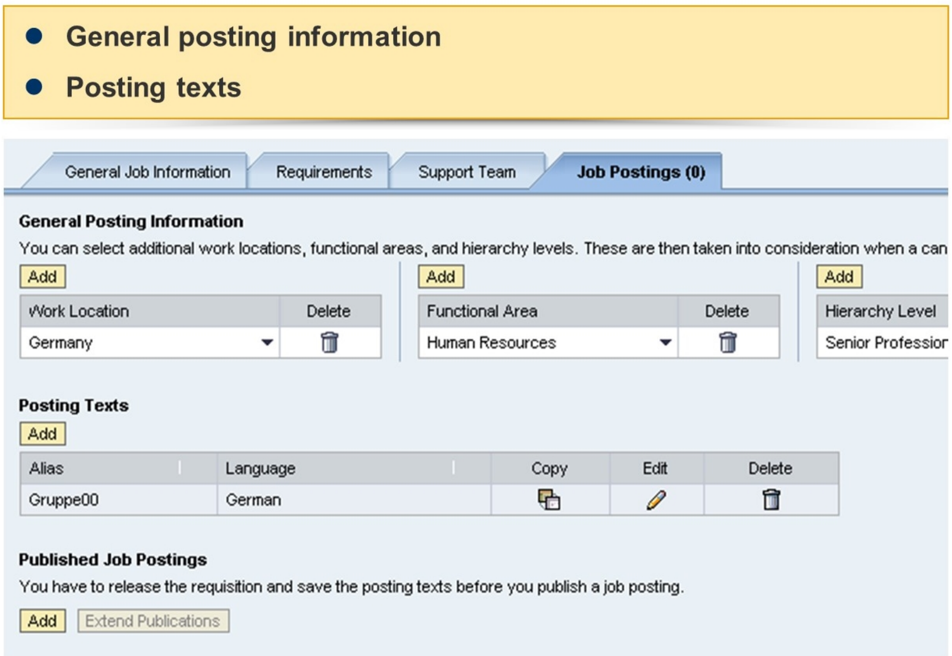

Figure 83: Creating a Job Posting

In a posting, one or more vacancies in a company are published with the aim of attracting suitable applicants.

Benefits of postings are as follows:

- Defines where the posting will be available (posting channel), for example, internal, external, job boards, Internet, intranet)
- Automatic publication in posting channels
- Free definition of formats using templates
- Evaluation of posting efficiency, for example, number of applications received from each posting channel.

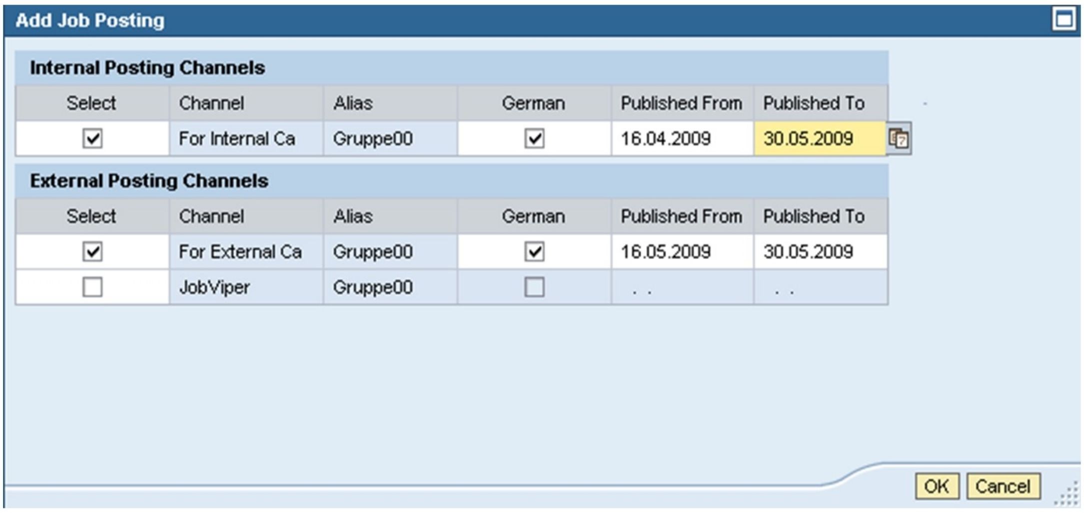

Figure 84: Published Job Posting

To control the visibility of a specific publication you can assign it a start and end date. A unique reference code is created for every publication and the publication can be flagged as a hot job to position it as a particularly interesting publication on an online job board.

Integration

E-Recruiting uses the organizational structure as the basis for the requisition (organizational unit, position, job) or just to determine the number of positions. A data overview can show information coming from Organizational Management such as links, infotypes, objects, and important relationships. The data overview is formatted using SMART Forms.

The following integration options are available:

- The organizational plan (organizational units, positions, jobs, and so on)
- Automatic identification of employees as internal applicants
- Automatic data transfer when candidates are hired
- Transfer of the qualifications catalog from Personnel Development

These integration options can be further supported if you automate the recruiting process through:

- Defining a support team

- Workflow integration
- Automatic candidate assignment
- Support for mass processing (for example, generate 50 rejections at the touch of a button)
- Flexible status management with status reasons
- Use of skills catalog from E-Recruiting or use of the SAP system qualifications catalog

LESSON SUMMARY

You should now be able to:

- Create a requisition to start the recruitment process

Unit 4
Lesson 2

Applying for a Vacant Position

LESSON OVERVIEW

This lesson shows you how to register an external applicant.

Business Example

As a Human Resources Business Partner responsible for recruiting, you must be able to utilize the SAP E-Recruiting solution to register applicants into the talent pool. For this reason, you require the following knowledge:

- A good understanding of the SAP E-Recruiting solution
- A good understanding of application processes
- A good understanding of informaiton required on an application

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Register an external candidate for a vacant position

Application Process Overview

The recruiter has the tools to handle all administrative tasks in recruiting to support the entire recruitment process. On the SAP E-Recruiting start page for recruiters (and managers), there are two basic options for viewing and processing applications; Application Management and Candidate Selection.

When a candidate finds a suitable position, the candidate can apply for it using the application wizard. Different application wizards can be made available for internal and external candidates. Data areas of the wizard are defined and questionnaires can be included. Default values may be presented for candidates who have registered in your talent pool.

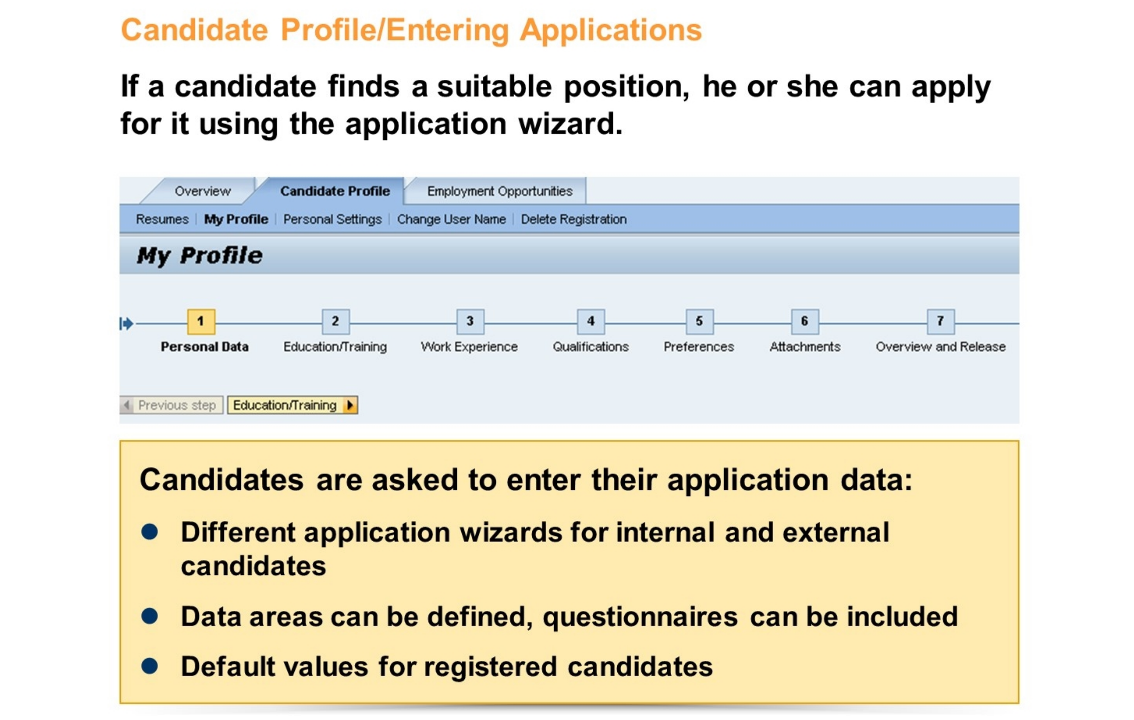

Figure 85: Data Maintenance: Candidate view

An application wizard is a predefined sequence of views that the system presents to a candidate to ensure completeness of the application documents. The application wizard guides the candidate step-by-step through all the topics.

The candidate uses the application wizard to go through all the views relevant for his or her application and can store or check information in these views. The candidate then enters an application cover letter and sends of the application. This ends the application wizard. The candidate can also upload documents such as a resume.

Search functions in E-Recruiting offer flexible selection options.

Search options for candidate selection include selections such as the following:

- Search for profile elements
- Search for specific qualifications
- Customize search functions
- Indicate required search criteria
- Rank search results

The Search Query Builder dynamically puts together queries for requisitions.

Ranking (the rating of candidates in terms of suitability) can be done with the help of search criteria and completed questionnaires. Online ranking and individual ranking is done by the recruiter.

A questionnaire is a compilation of questions to which a person (candidate, recruiter) replies as part of the Applicant Tracking Process.

Application Management

On the E-Recruiting start page for recruiters and managers, applications may be viewed using Requisition Management or Application Management functionality.

Application Management

Area	Task
Requisition Management: Candidate Selection	• Assign candidates to requisitions which creates assignments • Candidates can be processed one at a time • Mass processing of several candidates
Application Management: Applications	• View all applications for the requisition • View existing applications from internal and external candidates

LESSON SUMMARY

You should now be able to:

- Register an external candidate for a vacant position

Unit 4
Lesson 3

Determining Information in the Talent Warehouse

LESSON OVERVIEW

This lesson shows you how to maintain talent information in the Talent Warehouse.

Business Example

As a Human Resources Business Partner responsible for recruiting, you must be able to find qualified candidates quickly using the Talent Warehouse as your first source of candidates. For this reason, you require the following knowledge:

- A good understanding of the SAP E-Recruiting solution
- A good understanding of information included in a Talent Warehouse

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Determine talent information in the Talent Warehouse

Talent Warehouse Process Overview

> Note:
> As of EhP4, Succession Planning is no longer part of SAP E-Recruiting. For information about Succession Planning see the Talent Management Unit.

Talent Relationship Management (TRM) integrates internal and external candidates in one talent pool. The purpose of TRM is to provide an environment where companies can practice proactive candidate recruiting as opposed to reactive. Recruiters can search for suitable candidates using search and match functionality and can segment and classify candidates into specific groups.

The purpose of the Talent Pool is to build up and foster long-term relationships with candidates. It serves as the central database for internal and external candidates.

Information about qualified candidates for whom the company currently has no vacancies can be used in future recruiting processes.

Candidates can register in the Talent Pool and store information about their qualifications, interests, and career plans.

The following data can be stored in the talent pool:

- Data for all candidates, edited to date.
- Data for all unsolicited applications.

- Data for all interested persons registered in the pool.
- Data for all employees (internal applications).

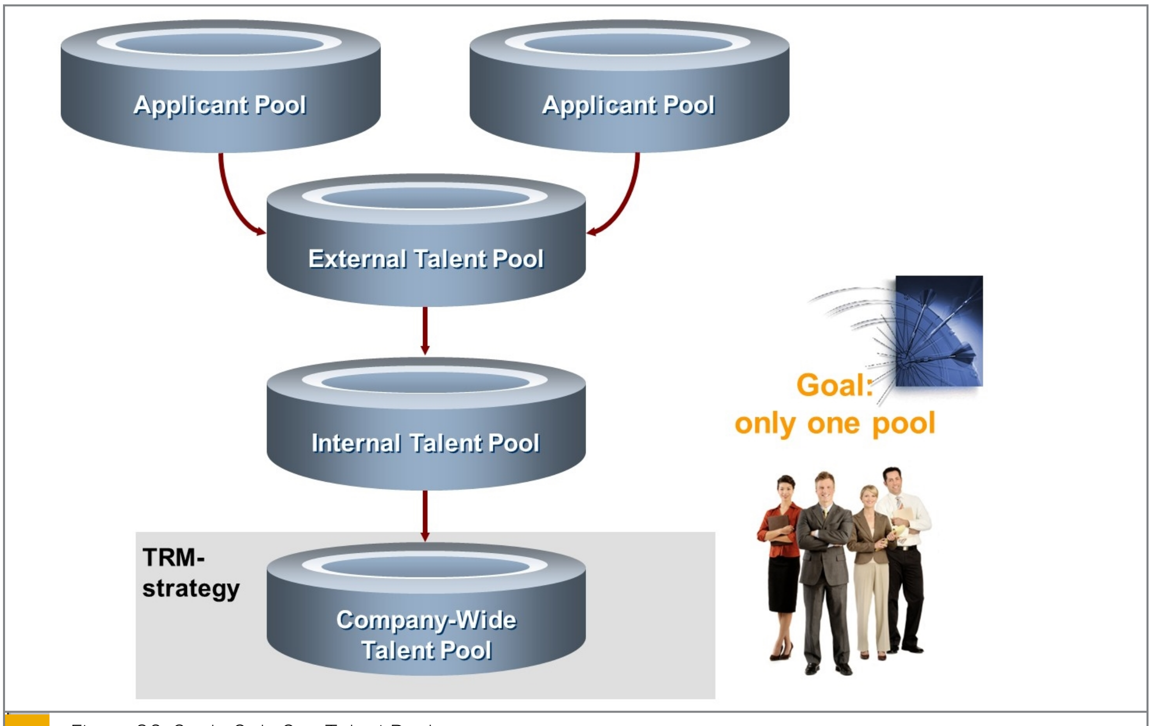

Figure 86: Goal - Only One Talent Pool

Services are available for candidates to manage their data in the talent pool.

The following on-line services are available to internal and external candidates:

- Logon/registration using personal start pages
- Search for vacancies (positions to be filled)
- Complete on-line applications
- Check the status of their applications

The Talent Pool is the place for candidates to search for new openings

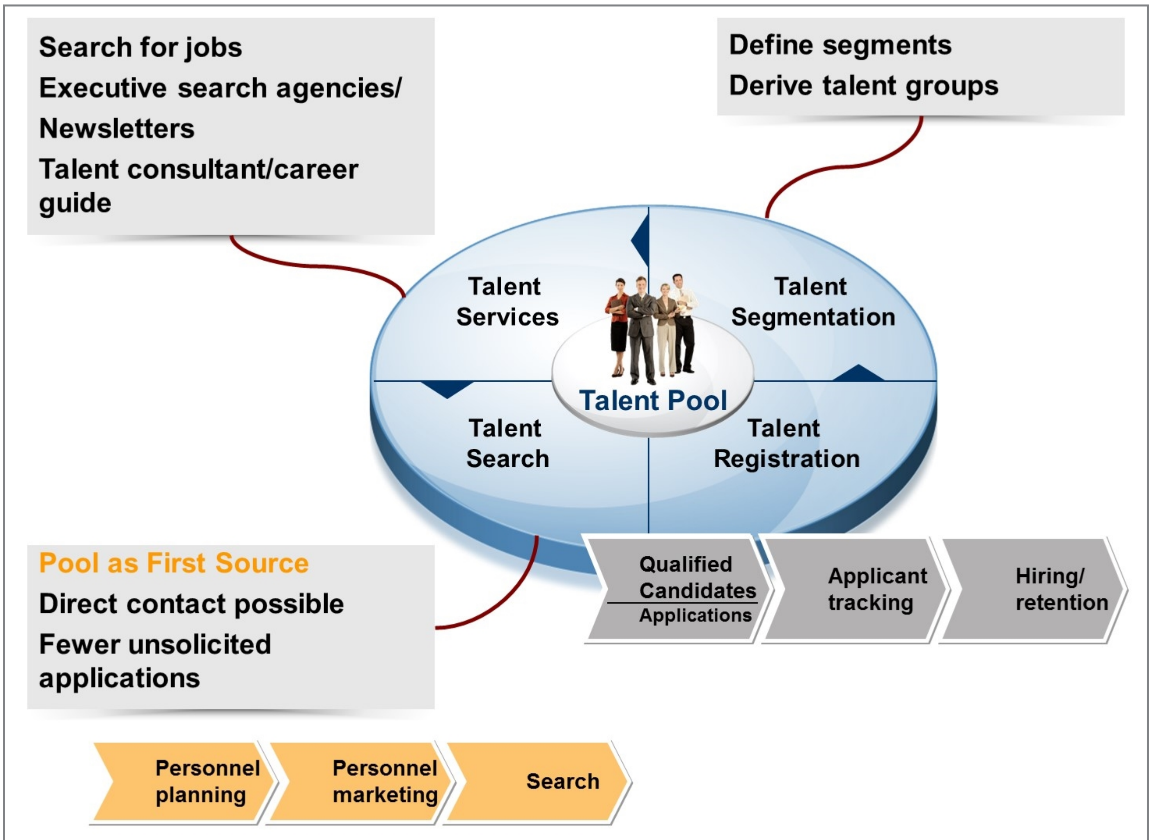

Figure 87: Talent Pool as Posting Channel and Marketing Tool

External candidates register in the talent pool, internal employees may also be found in the talent pool if the appropriate services are activated. The talent pool is the first place recruiters search for candidates and facilitates targeted marketing activities and search capability. An example of a target search would be for university graduates. Targeted recruitment activities can be developed for the different target groups such as high potential.

Talent Relationship Management

The philosophy behind the Talent Pool is that it should be the first place recruiters search for candidates, hence reducing the amount of unsolicited applications. Additionally segmentation, such as high potential or recent college graduates allows targeted marketing activities and search capability.

Talent Relationship Management provides support for recruiters such as:

Support	Detail
Candidate Activity Management	• invitation to an interview • invitation to a recruiting event • correspondence with candidates

Support	Detail
Advanced Search in the Talent Pool	• Ranking of search results • Find candidates with specific qualifications • Search of questionnaires
Classification of Candidates	• Classify candidates for specific needs
Services	• Application sources: - referrals - job boards - newspaper

Talent Relationship Management provides the following functions in E-Recruiting:

Talent Pool for Supporting Applicant Tracking

- Processes and services tailored to talent groups (such as outsourcing)
- Application-independent candidate classification (such as A, B, C)
- Activities for maintaining relationships (such as newsletters and correspondence)
- Using the Talent Pool as a posting channel
- Analysis of qualifications based on the Talent Pool

Talent Pool for Supporting Candidates

- Consistent separation of talent and applicant: reusing application data
- Services aligned to requirements and interests
- One registration for several applications
- Questionnaires

Talent Relationship Management (TRM) allows the development of targeted recruitment activities for different target groups . Candidate ranking is a special type of TRM process.

Examples of candidate ranking are as follows:

- High potential
- Mediocre candidate
- Unsuitable candidate
- Candidate has submitted several unsuccessful applications.

Analytics

LESSON SUMMARY

You should now be able to:

- Determine talent information in the Talent Warehouse

Determining Reporting Options Available for SAP E-Recruiting

LESSON OVERVIEW

This lesson shows you how to maintain talent information in the Talent Warehouse.

Business Example

As a Human Resources Business Partner responsible for recruiting, you must be able to find qualified candidates quickly using the Talent Warehouse as your first source of candidates. For this reason, you require the following knowledge:

- A good understanding of the SAP E-Recruiting solution
- A good understanding of information included in a Talent Warehouse

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Determine SAP E-Recruiting reporting options

SAP E-Recruiting Reporting Options

The integration with Analytics Tools, such as with SAP Business Information Warehouse, offers extensive reporting options, such as reporting for the most efficient recruitment channels.

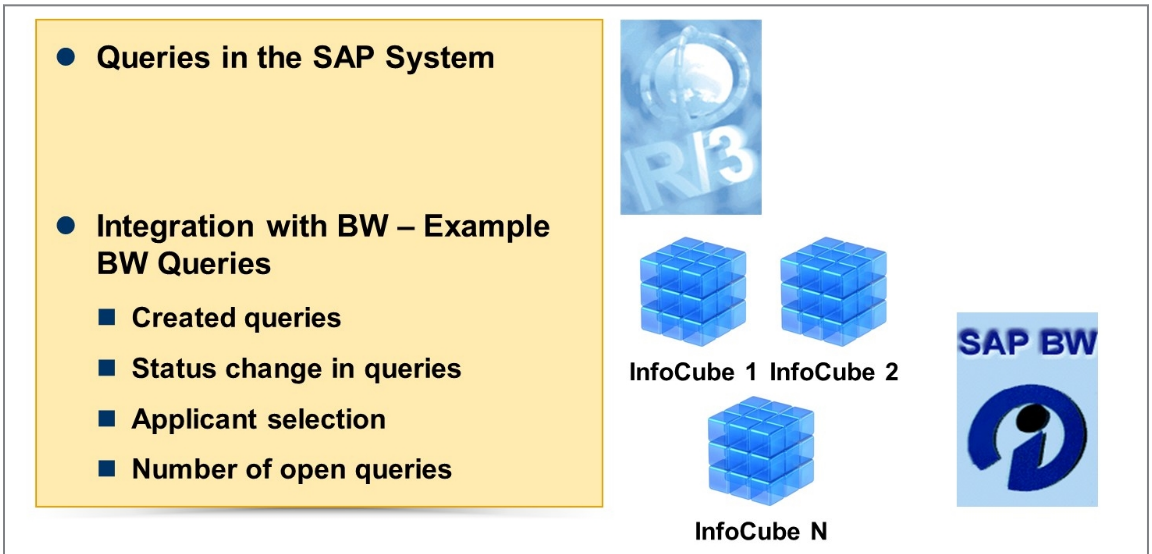

Figure 88: Analytics

Examples of Business Warehouse / Business Intelligence Queries are as follows:

Query Name	Query Name
• Requisitions Created	• Requisition Status Changes
• Application Source	• Number of Open Requisitions
• Interview versus Offer Rate	• Candidate's Qualifications
• Application Submitted versus Offer Rate	• Requisition Status Change Reason
• Offer versus Acceptance Rate	• Time-to-Fill (Open to Filled)

In addition to the operational queries, there are InfoSets delivered for ad hoc query reporting on E-Recruiting data.

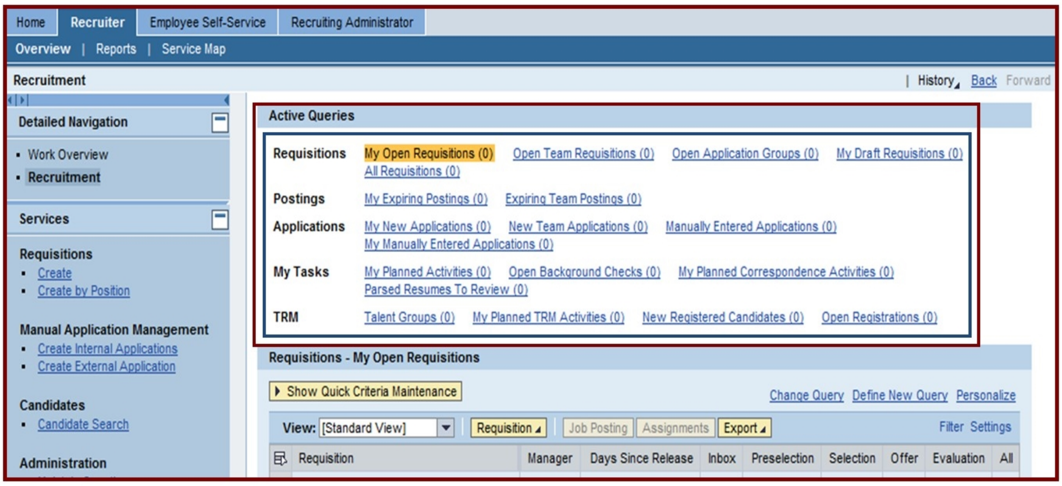

Figure 89: SAP E-Recruiting Personal Object Worklist Queries (POWL)

Personal Object Worklist (POWL)

A dashboard allows recruiters to gain an overview of their current recruitment processes and work on these processes. The dashboard contains the recruiter’s work items, which are grouped into different worklists. The recruiter can perform the relevant functions for each of the work items in the worklists. New Personal Object Worklist (POWL) queries are available as of enhancement package 4 - support package 4 and in all future enhancement packages.

LESSON SUMMARY

You should now be able to:

- Determine SAP E-Recruiting reporting options

Learning Assessment

1. A requisition cannot be started in Manager Self-Service

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. Describe the support team.

   ____

   ____

   ____

3. A recruiter cannot enter applications for internal nor external candidates.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. A requisition cannot be started in Manager Self-Service

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

   Correct. Requisitions can be initiated either in SAP E-Recruiting or through Manager Self-Service.

2. Describe the support team.

   The support team lists all of the people who are able to see the requisition. Their role in the support team determines what they can and cannot do, and may also be used in correspondence.

3. A recruiter cannot enter applications for internal nor external candidates.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

UNIT 5

Time Management

UNIT OBJECTIVES

- Review time management processes
- Record employee time data
- Record employee time data using Time Manager's Workplace (TMW)
- Evaluate employee time data
- Enter time using the Cross-Application Time Sheet

Unit 5
Lesson 1

Outlining Time Management Basics

LESSON OVERVIEW

This lesson shows you how to access employee time information using SAP Human Capital Management.

Business Example

You are responsible for time management and must be able to explain the basic elements of the time function within SAP HCM. For this reason, you require the following knowledge:

- A good understanding of the time management process
- A good understanding of how time is maintained in the system
- A good understanding of the options available for entering time data

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Review time management processes

Employee Time Data

Evaluating work performed by employees and determining employee availability within an enterprise are essential elements for a human resources system.

Work performed by employee is also relevant for the following areas:

Controlling:

Working times can be used for activity allocation in controlling. Costs generated by the working times can be assigned according to their source in controlling.

Logistics:

Information from time management is used in logistics to determine employees' availability for capacity requirements planning.

Planned Working Time Infotype

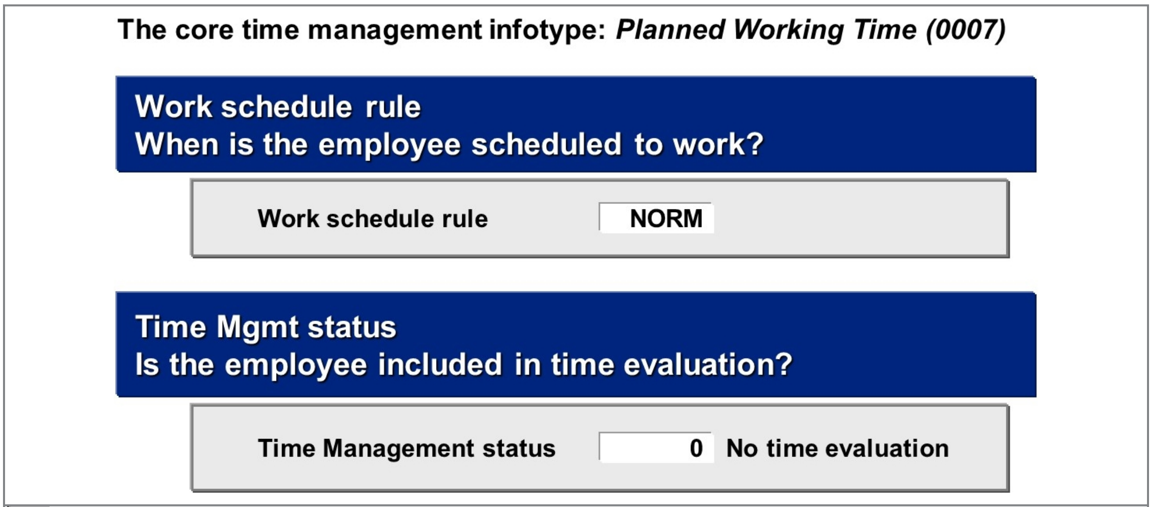

Figure 90: Planned Working Time Infotype

SAP Time Management enables you to determine work requirements for the enterprise and plan employee shifts to meet those requirements.

Planned working time is defined as the daily working period from start to end time, excluding breaks. By defining the planned working time for your employees, you determine how long they must work in your enterprise on a daily basis.

Information on working time specific to a particular employee is represented in his or her personal work schedule. The personal work schedule contains the deviations from and exceptions to an employee’s working time that have been recorded.

You assign a work schedule to an employee on the Planned Working Time infotype (0007) using work schedule rules.

Recording Time Data

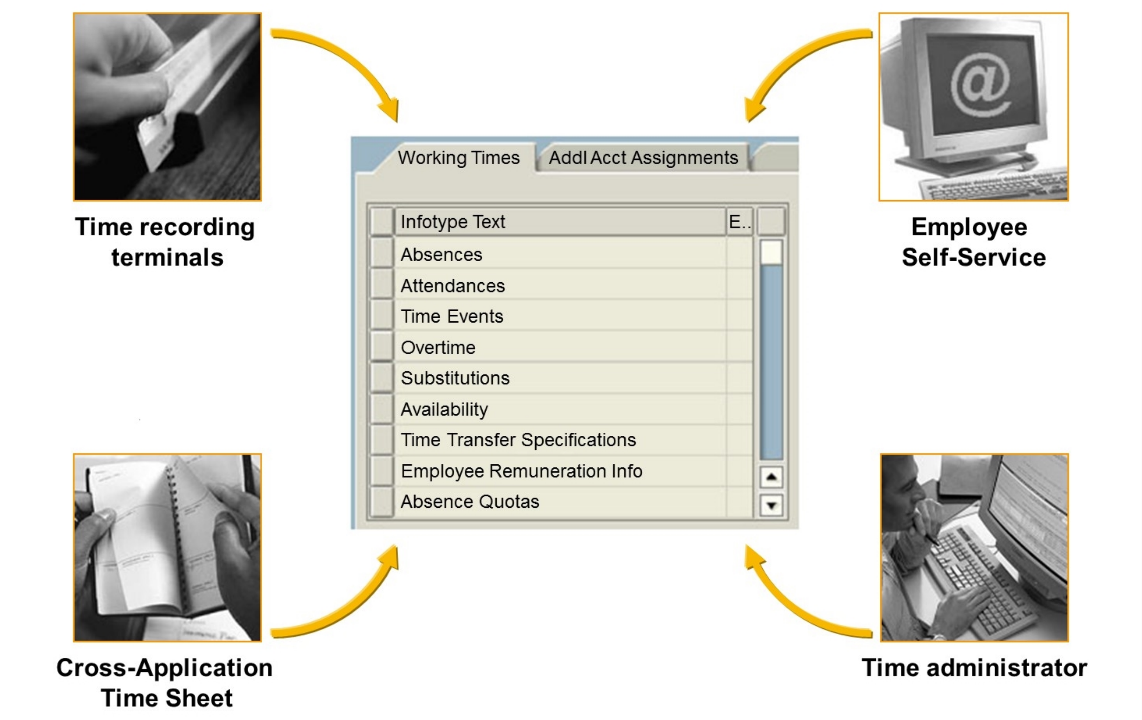

Figure 91: Recording Data in Time Management

Time management allows you to flexibly display and record working times. Information on working times is used to calculate gross wages in payroll. You can manage time accounts (such as leave and flex time) manually or automatically.

Examples of time recording options include the following:

Time Managers Workplace (TMW)
: Time Managers Workplace is used by time administrators to maintain time for groups of employees.

Cross-Application Time Sheets (CATS)
: Cross-Application Time Sheets are used by both employees and time administrators to enter actual working time.

Online data recording
: Online data recording is used by time administrators.

Time Recording Systems
: Customers may use external time recording systems and interface time data to the SAP system.

Employee Self-Service (ESS)
: Employees can enter their own time data using an ESS portal or SAP NetWeaver Business Client.

Customer System
: Time administrators can use a customer system with an interface to the SAP system.

Individual Infotype Maintenance

Time administrators can record and change time date using infotype screens.

Fast entry

Time Administrators can use fast entry to enter time for multiple employees using one data entry screen.

Work Schedules

Public Holiday Calendar

The central element in time management is the employee's work schedule. The work schedule contains planned specifications for the employee's working time.

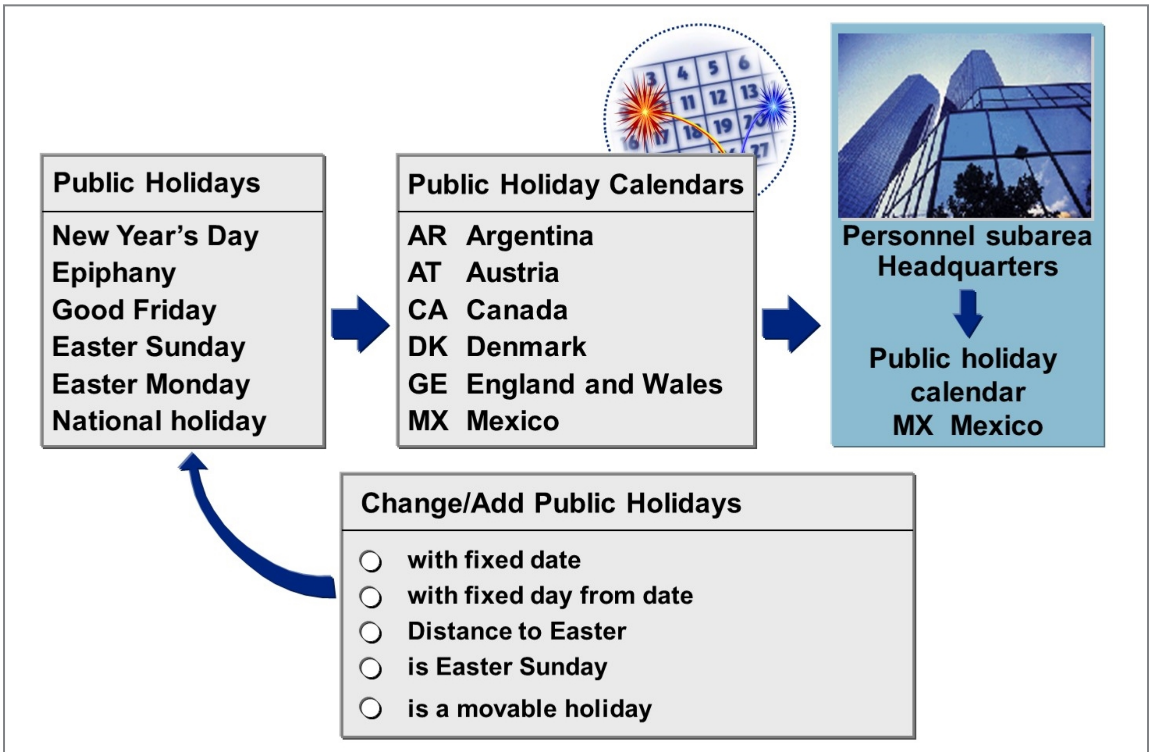

Figure 92: Public holiday calendar

The standard SAP ERP system contains public holiday calendars which include regional holidays. You can change existing holidays and define new holidays in the public holiday list. A public holiday calendar is assigned to each personnel subarea. This is important for payroll as public holidays are taken into account when determining, time such as vacation and overtime.

Work Schedules

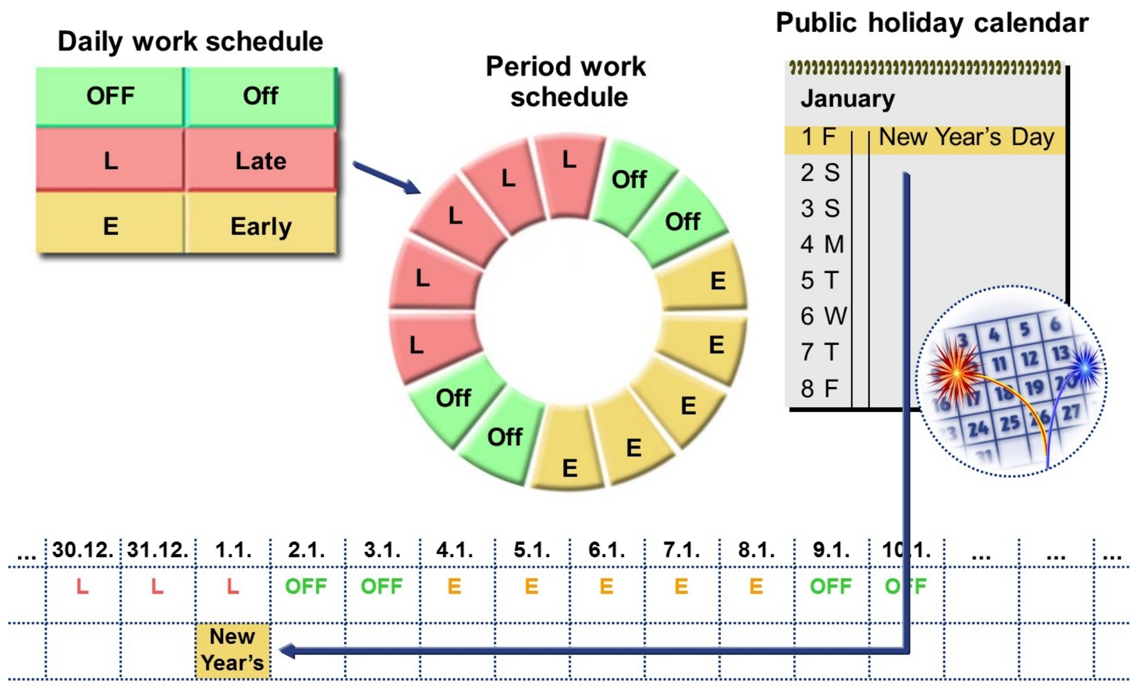

Figure 93: Work Schedules (2)

The central element in time management is the employee's work schedule. The work schedule contains planned specifications for the employee's working time.

An employee's planned working time is represented in a work schedule. The work schedule is generated from a period work schedule and a public holiday calendar. The period work schedule includes a specific sequence of daily work schedules. The daily work schedule contains information on daily working time including breaks. The sequence can reflect regular and variable working times. The period work schedule is applied to the calendar. The work schedule rule encompasses all the specifications required to define the work schedule.

The work schedule is used as the basis for time data evaluation. The work schedule indicates how many hours employees are expected to work. Depending on the specifications defined for the individual employee, any additional hours worked are identified as overtime in time evaluation.

Recording Time Data

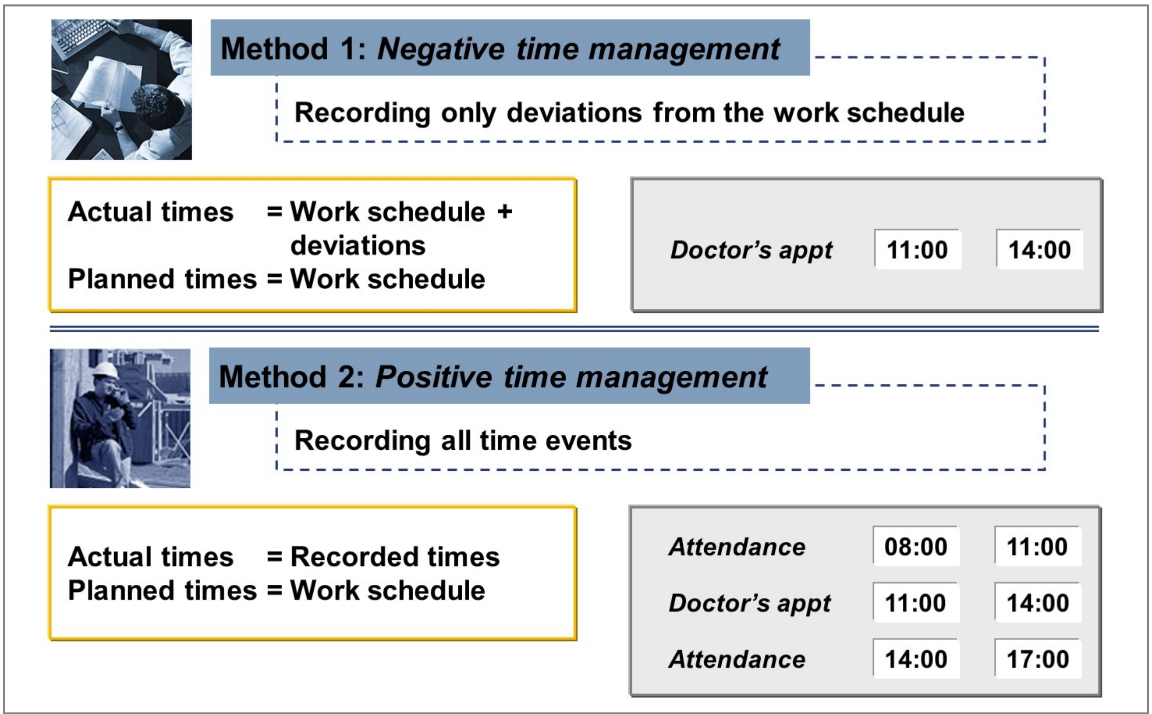

Figure 94: Recording Time Data

You can use two different methods to record employee time data in the SAP system:

The methods for recording employee time data are as follows:

Negative Time Recording:

With this method, only deviations from the work schedule are recorded. Examples include illness, substitutions, and vacation. If you only record deviations from the work schedule, planned working time is used as the basis for time evaluation.

Positive Time Recording:

With this method, all actual times are recorded. This includes time such as the hours actually worked, absences, and vacation. Actual times can be recorded using separate time recording systems. The data is then uploaded to the SAP system, where it is processed in time evaluation. Alternatively, employee time can be recorded manually using the Attendances infotype (2002).

LESSON SUMMARY

You should now be able to:

- Review time management processes

Unit 5
Lesson 2

Recording Time Data

LESSON OVERVIEW

This lesson shows you how to record time data using Time Manager's Workplace.

Business Example

You are responsible for entering employee time data and must be able to create, modify, and manage employee time infotypes. For this reason, you require the following knowledge:

- A good understanding of time infotypes
- A good understanding of Time Manager's Workplace
- A basic understanding of time management

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Record employee time data
- Record employee time data using Time Manager's Workplace (TMW)

Time Data

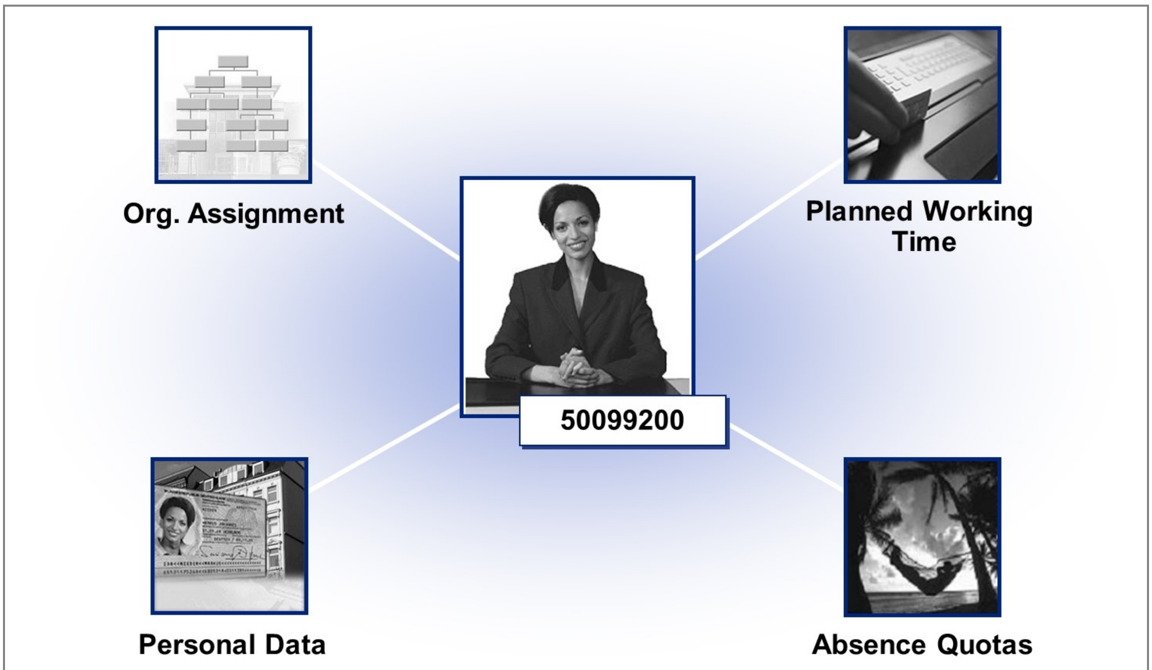

Figure 95: Required Infotypes for Negative Time Management

In Time Management, certain master data infotype records must exist for every employee. Time management data is stored in the same master data records used by other HCM areas, such as Payroll or Personnel Planning and Development.

The following master data infotypes are required for negative time management:

Infotype	Information Provided
Organizational Assignment (0001)	• employee assignment within the company (company code, personnel area, personnel subarea, position held, employee group, employee subgroup, etc.) • payroll area assignment • staffing percentage • administrator assignments (personnel, time, payroll)
Personal Data (0002)	• personal information including name, date of birth
Planned Working Time (0007)	• assigned work schedule rule • time management status • details of working time (employment percentage, daily/weekly/monthly/annual working hours)

Time Manager's Workplace

The Time Manager's Workplace (TMW) is a user interface for recording time data using time data IDs to enter data which is stored in the relevant time infotypes.

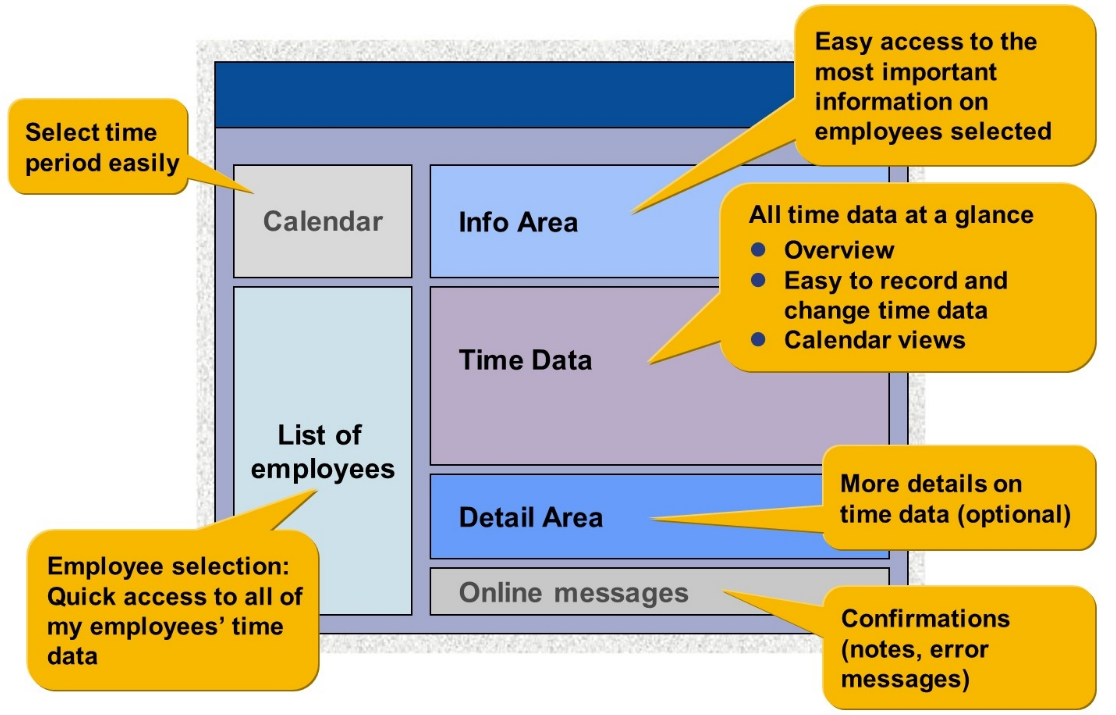

Figure 96: Layout and Screen Areas of the Time Manager's Workplace (TMW)

The Time Data Maintenance and Message Processing tasks are delivered in the Time Manager's Workplace in the standard system.

Areas of Time Manager's Workplace include the following:

Area	Function
Calendar	• select the time period for which time data is to be entered
List of Employees	• contains the employees assigned to the time administrator • the time administrator can select the employee or employees from this list and enter or change time data
Info Area	• time administrator can display additional information for the selected employee (such as master data information or how much leave the employee has remaining)
Time Data	• shows all time data at a glance • enter and maintain time data using time data IDs (such as "I" for Illness or "D" for doctor or "L" for leave)
Details Area	• enter additional specifications for the time data (such as activity allocation, specifications for an attendance), if required • view details of specific entries • this area can be displayed or hidden

Area	Function
Messages Area	• time entry messages are displayed

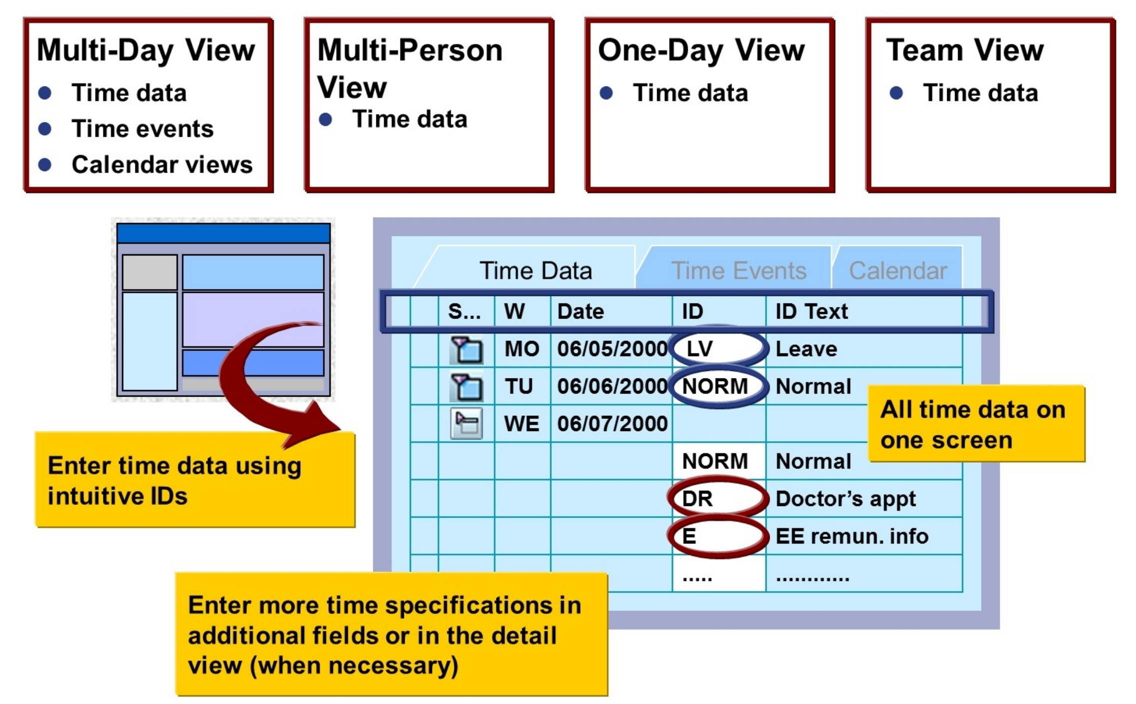

Figure 97: Recording Time Data

The Time Manager's Workplace is a task-oriented interface for maintaining time data and processing evaluation messages. This interface is specifically designed to meet the needs of time administrators in decentralized departments.

The screen and functions displayed in the Time Manager's Workplace can be adjusted by using profiles to meet the task-specific requirements of time administrators. The Time Manager's Workplace is always called using a profile that determines the employee selection called and the fields, columns, layout, views, and functions used.

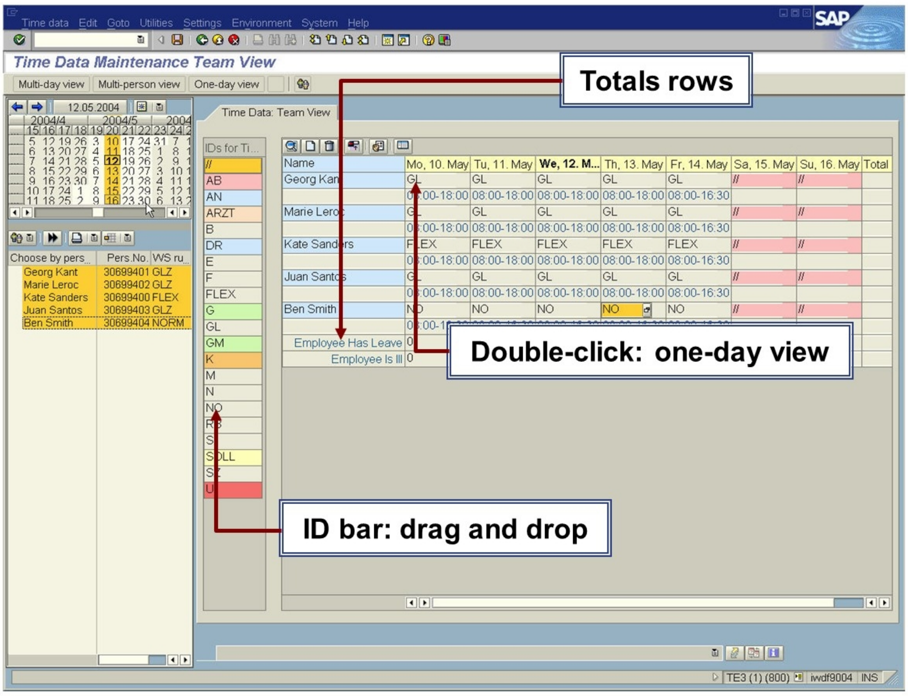

Figure 98: TMW Team View

Using the team view, time administrators can record time data for several employees on one screen. The team view can be used to obtain overview information, such as who is absent due to illness or leave.

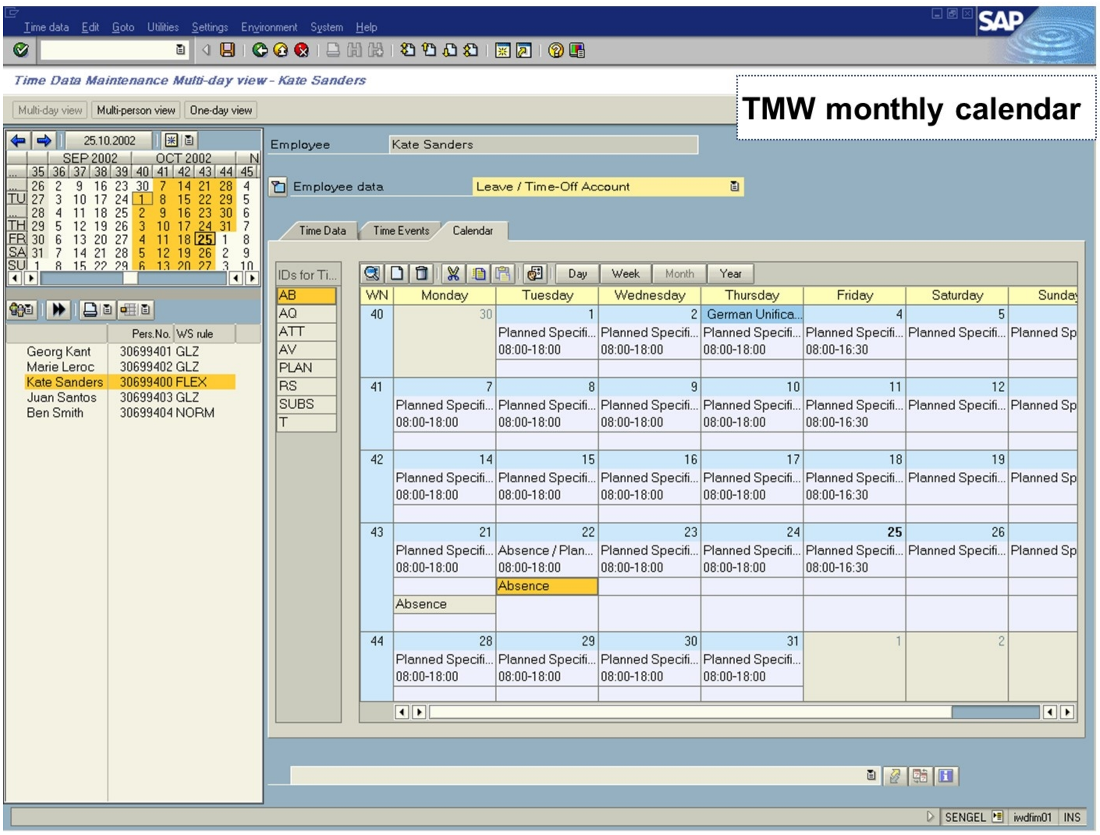

Figure 99: Calendar Views in the TMW

The calendar view provides a graphical overview of a person's time data. The day, week, month, and year calendars are available.

You can also maintain data in the calendar. Color-coded time data IDs are displayed in a bar to the left of the calendar. You can drag & drop them to the required days and process the entry further using copy & paste. For example, recurring attendances/absences are copied to the appropriate days. You can determine your own user settings for each calendar view. For example, you can choose yellow as the color for the column heading.

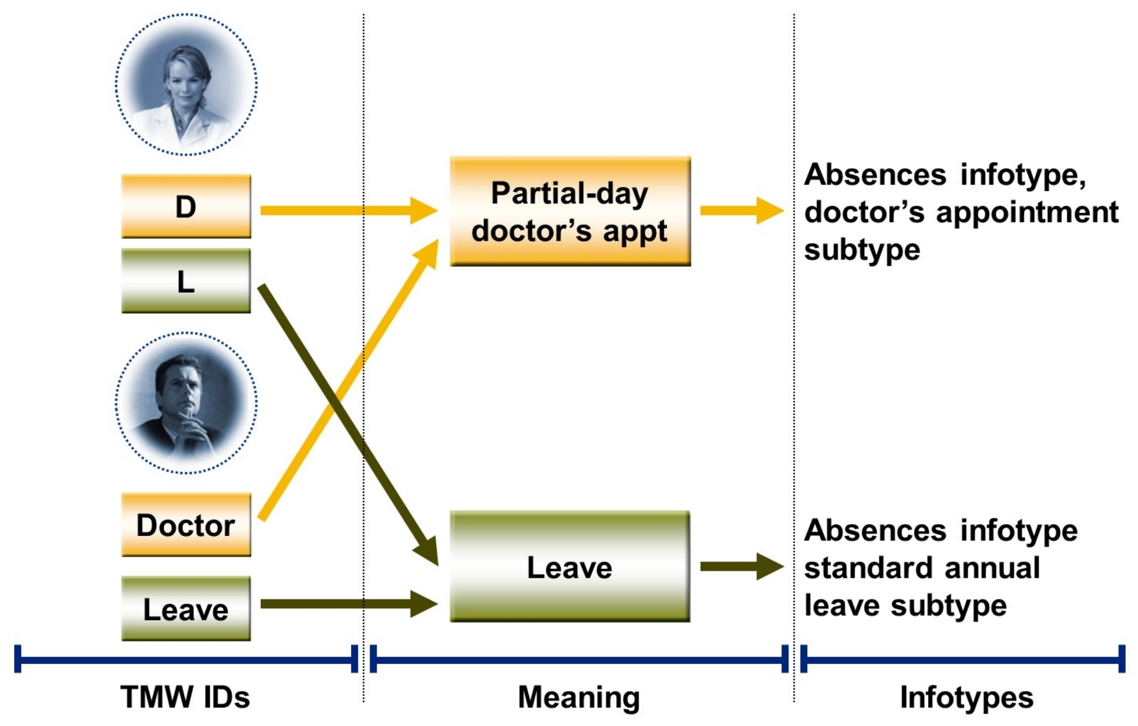

Figure 100: Personalized Time Data IDs

Time IDs are defined for each type of time data in customizing. For example, a time data ID such as OT can be defined for an absence type that is valuated using an overtime compensation type (such as time off plus overtime rate) in time evaluation. The attendances infotype (2002) and subtype for this attendance type are assigned to the time data ID in customizing. The overtime compensation type is also defined for the time data ID.

Time data entered in the TMW using time data can also be processed in the Time Data Maintenance transaction and vice versa.

Time data IDs can be generic, for example, the corresponding subtype is not specified. If time administrators use a generic ID for time data, they should specify its use in the details area.

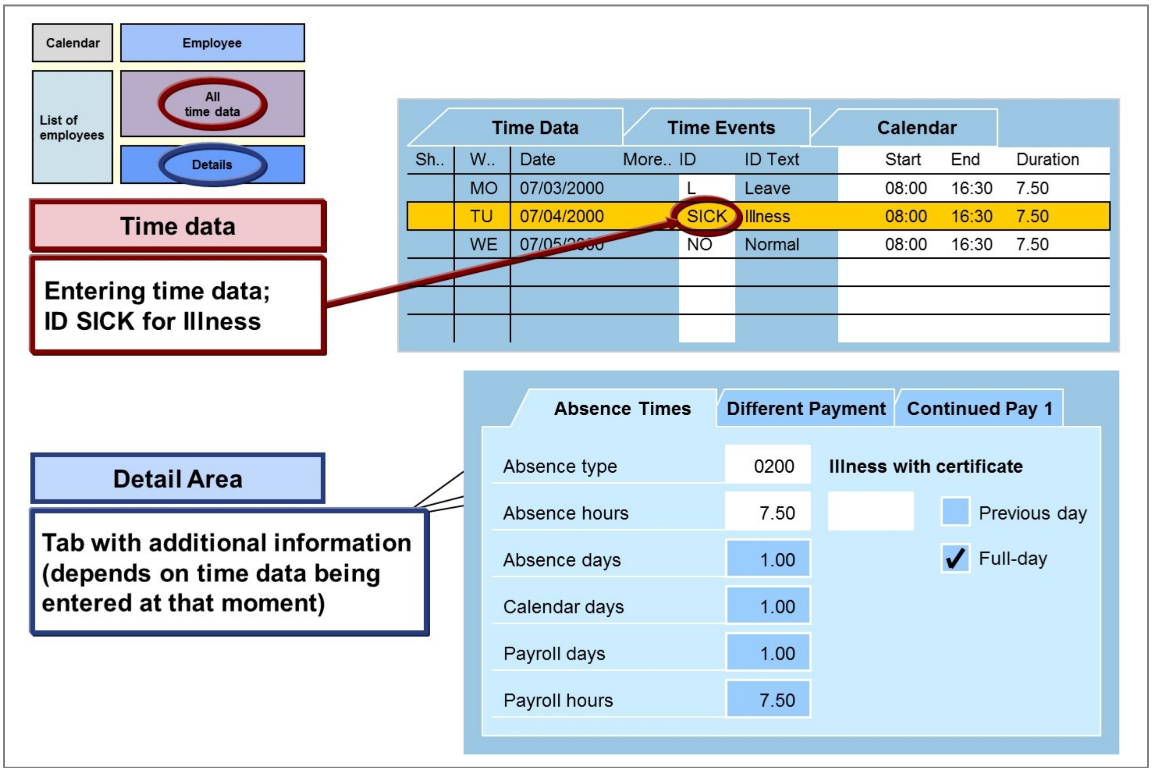

Figure 101: Absence type: Illness

When you record the absence type Illness in TMW, the information is stored in the Absences infotype (2001) as subtype Illness.

Absence hours and absence days are calculated on the basis of an employee's personal work schedule.

The calendar days are the number of days between the start and end date in the leave record, including non-working days.

Hint:
Depending on the country-specific laws, you may require additional information on incapacity to work. You can enter this information in additional fields.

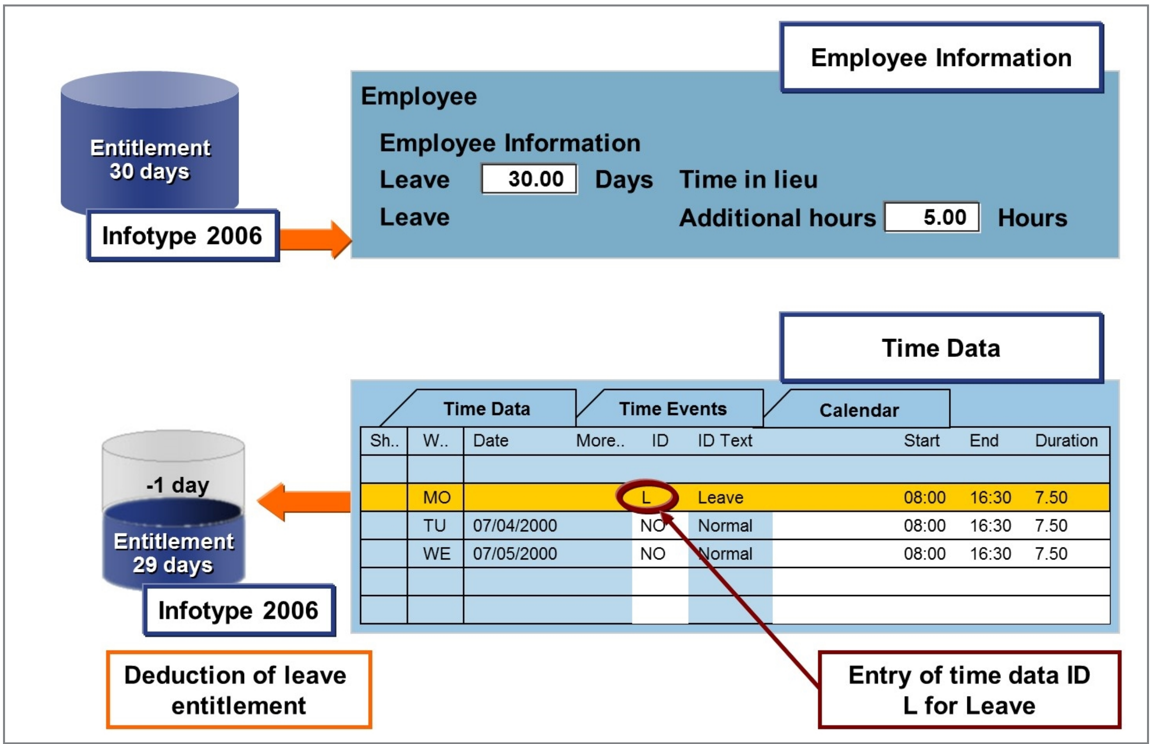

Figure 102: Absence Type: Leave

Like the other absences, the absence type Leave is also recorded in TMW and the data is stored as a subtype of the Absences infotype (2001).

Hint:
You can only save this absence type if there is sufficient quota available. You can determine leave entitlement for all employees at once using the report RPTQTA00 (Generating Absence Quotas).

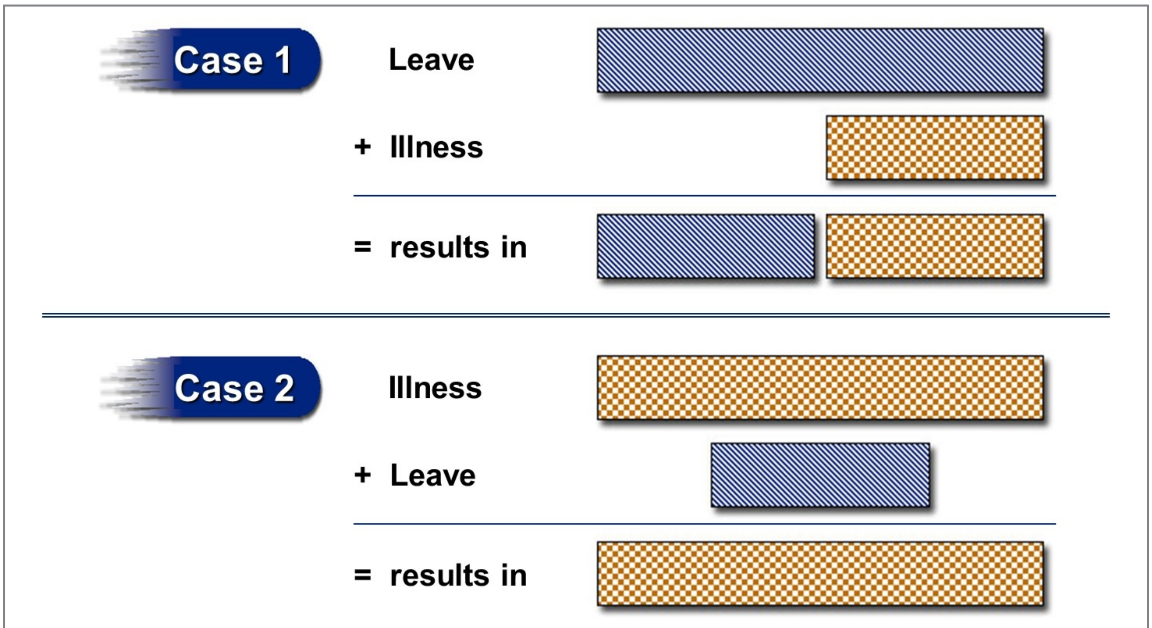

Figure 103: Collision Checks: Examples

When recording time data, data records sometimes overlap one another. These overlapping records are called collisions.

When you enter a new time data record, the system checks whether other records have been entered for the employee for the same time period. Collision checks prevent data records that conflict with one another from coexisting in the system.

When collisions occur, the system reacts by issuing a warning or error message, or by delimiting the old record.

Hint:
You can define collisions for all time management infotypes in customizing.

LESSON SUMMARY

You should now be able to:

- Record employee time data
- Record employee time data using Time Manager's Workplace (TMW)

Evaluating Time Data

LESSON OVERVIEW

This lesson shows you how to evaluate time data.

Business Example

As the time administrator, you are responsible for processing time evaluation for all employees. For this reason, you require the following knowledge:

- A basic understanding of time data recording
- A good understanding of time management

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Evaluate employee time data

Time Evaluation

In SAP HCM Time Management, there are certain master data infotype records that you must create for every employee. Time management data is stored in the same master data records used by other HR areas, such as Payroll or Personnel Planning and Development.

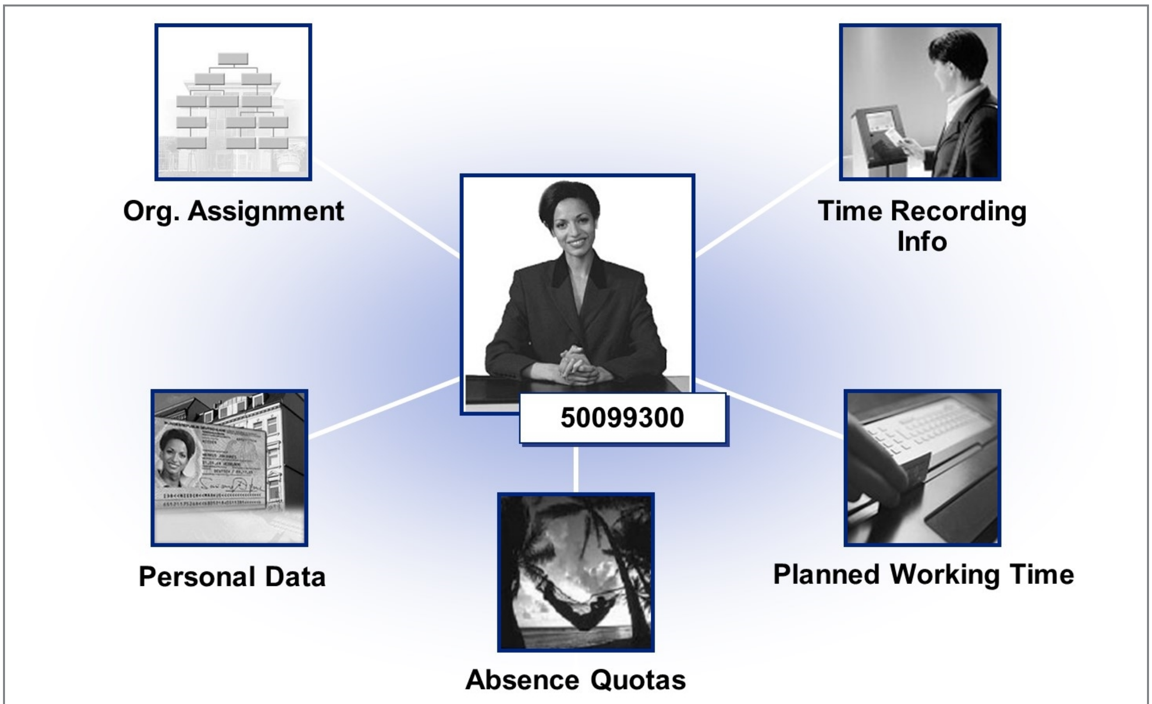

Figure 104: Required Infotypes for Positive Time Management

The following master data infotypes are required for positive time recording:

Infotype	Information Provided
Organizational Assignment (0001)	• employee assignment within the company (company code, personnel area, personnel subarea, position held, employee group, employee subgroup, etc) • payroll area assignment • staffing percentage • administrator assignments (personnel, time, payroll)
Personal Data (0002)	• personal information including name, date of birth
Time Recording Information (0050)	• this infotype is used in time evaluation • can contain interface data on the subsystem • can contain additional data on the employee that is relevant for time evaluation

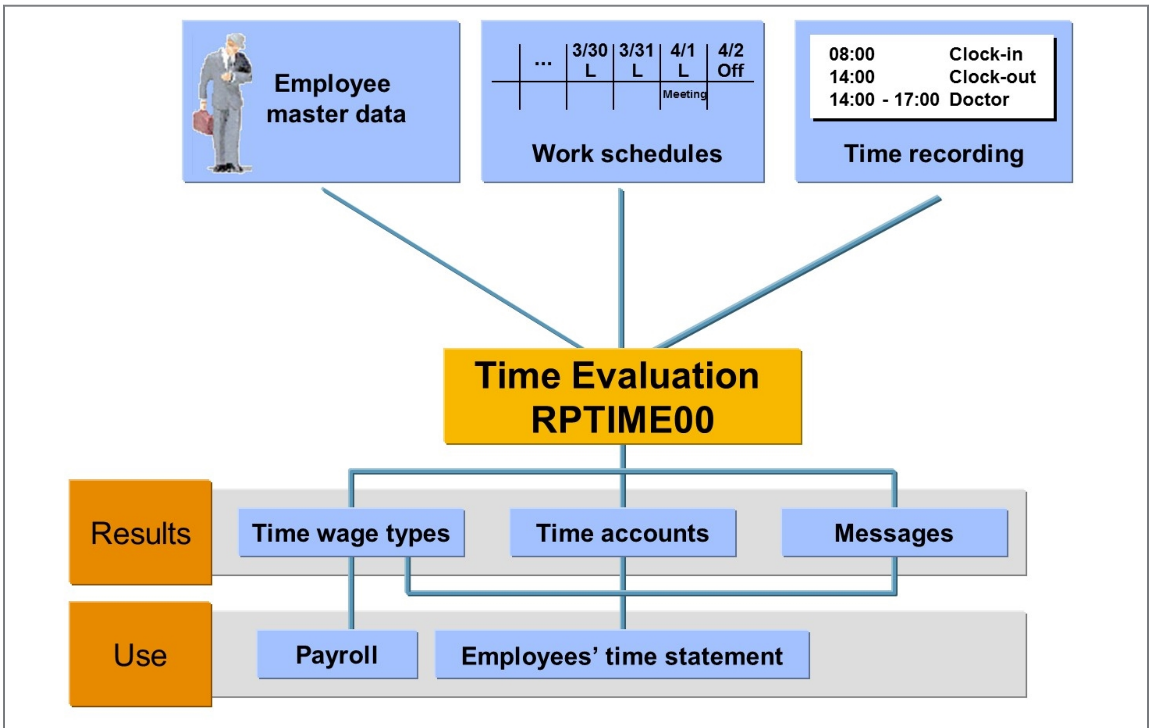

Figure 105: Time Evaluation: Overview

In the SAP HCM system, the term time evaluation is used to describe the evaluation of employees' attendances and absences using a report.

Front-end time recording systems are often used to record actual data. Employees use these systems to record their start and end times (actual working times) electronically using a time recording ID card. The data is then uploaded to the HCM system, where it is processed in time

evaluation. The system then compares the employees' actual times with those specified in the monthly work schedules, and valuates the data.

Use of time recording terminals is not necessary for time evaluation. You can also record employees' working times manually using the attendances infotype (2002). It is also possible to perform time evaluation without having recorded employees' actual times.

The most common way for employees to enter their own working times is by using time recording systems. Using time recording systems considerably reduces the burden on HCM departments and time administrators.

Employees record their time at the time recording terminal when they:

- Arrive at work
- Have a break
- Work off-site
- Leave work

Time administrators can display, and if necessary change, the recorded time data or maintain it using Time Manager's Workplace or the Time Events infotype (2011).The infotype contains information such as the origin of the record (whether it was recorded manually or at a subsystem) and the terminal ID.

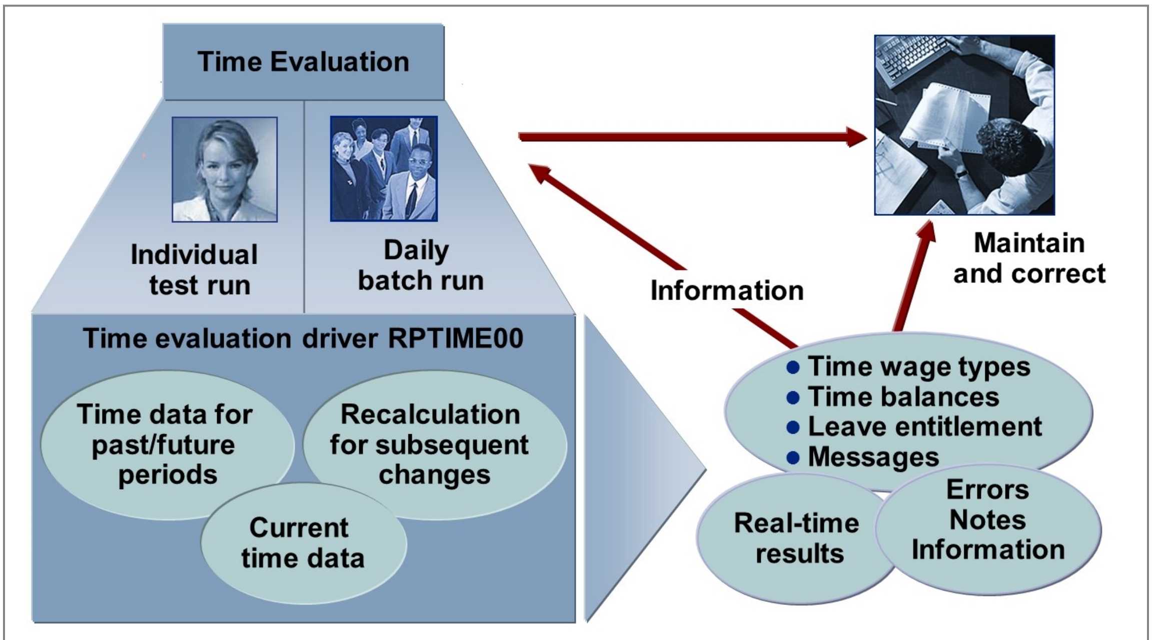

Figure 106: Time Evaluation Driver (RPTIME00)

Time evaluation is performed by the time evaluation driver RPTIME00. It evaluates employees' time data that has been recorded at the time recording terminals or on time management infotypes.

Time evaluation is started using a batch job and generally runs overnight. It is normally used for large groups of employees but can also be run for individual or small groups of employees. Time evaluation can also be run for past or future evaluation periods.

A future evaluation can be useful in the following situations:

- You want time evaluation to determine an employee's anticipated absence entitlements when absence quotas are generated automatically.
- You want to evaluate planned times in shift planning while taking anticipated overtime payments into account, for example.

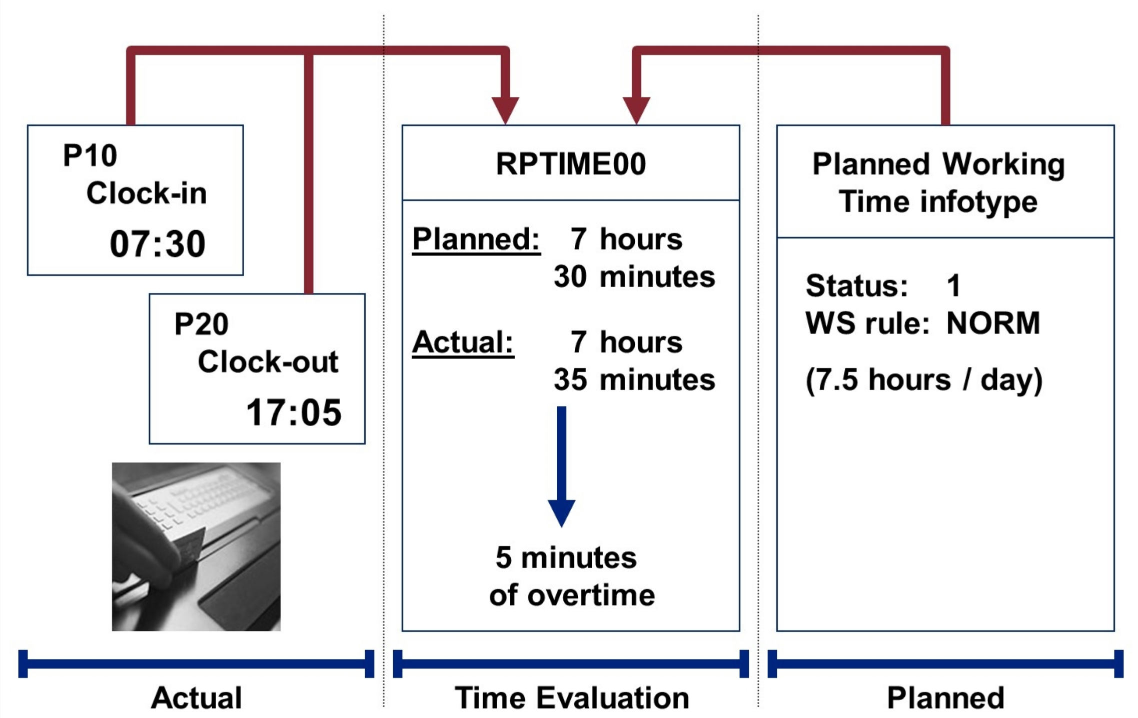

Figure 107: Principle of Time Evaluation

The time evaluation driver RPTIME00 compares the recorded actual times (in this case, time events P10 and P20) with the planned specifications from the planned working time infotype (0007). In the example displayed. this results in 5 minutes of overtime.

The overtime determined by the time evaluation driver has to be processed accordingly in the system.

LESSON SUMMARY

You should now be able to:

- Evaluate employee time data

Unit 5
Lesson 4

Using Cross-Application Time Sheet (CATS)

LESSON OVERVIEW

This lesson shows you how to use the Cross-Application Time Sheet (CATS).

Business Example

As an employee who must record time, you use the Cross-Application Time Sheet to record your data. For this reason, you require the following knowledge:

- A good understanding of time recording options
- A basic understanding of time management

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Enter time using the Cross-Application Time Sheet

Cross-Application Time Sheet

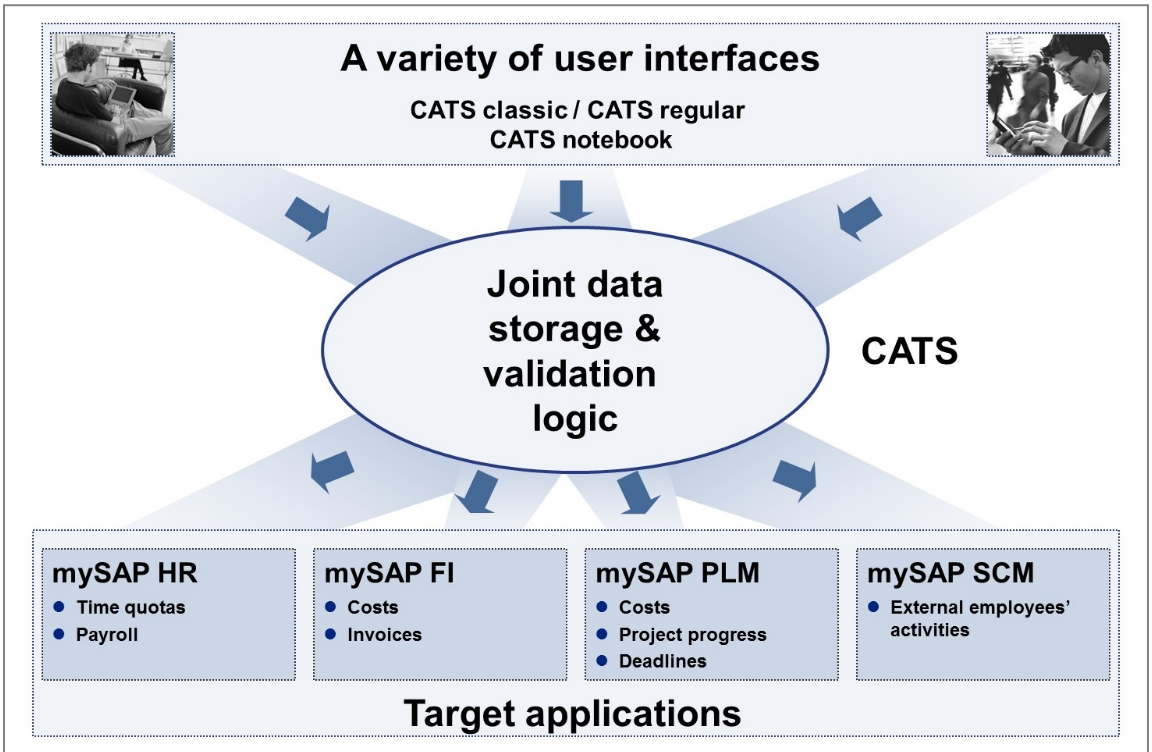

Figure 108: What is CATS?

The Cross-Application Time Sheet (CATS) is another form of Employee Self-Service. You can use it to record the actual working times of individual employees.

The Cross-Application Time Sheet offers the following advantages:

- Cross-application standard screens for entering working times
- Ease of use for all users
- Default values and data entry templates
- Integrated approval process
- Support for corrections
- SAP enhancements for increased flexibility in the definition of authorization checks, plausibility checks, and default values

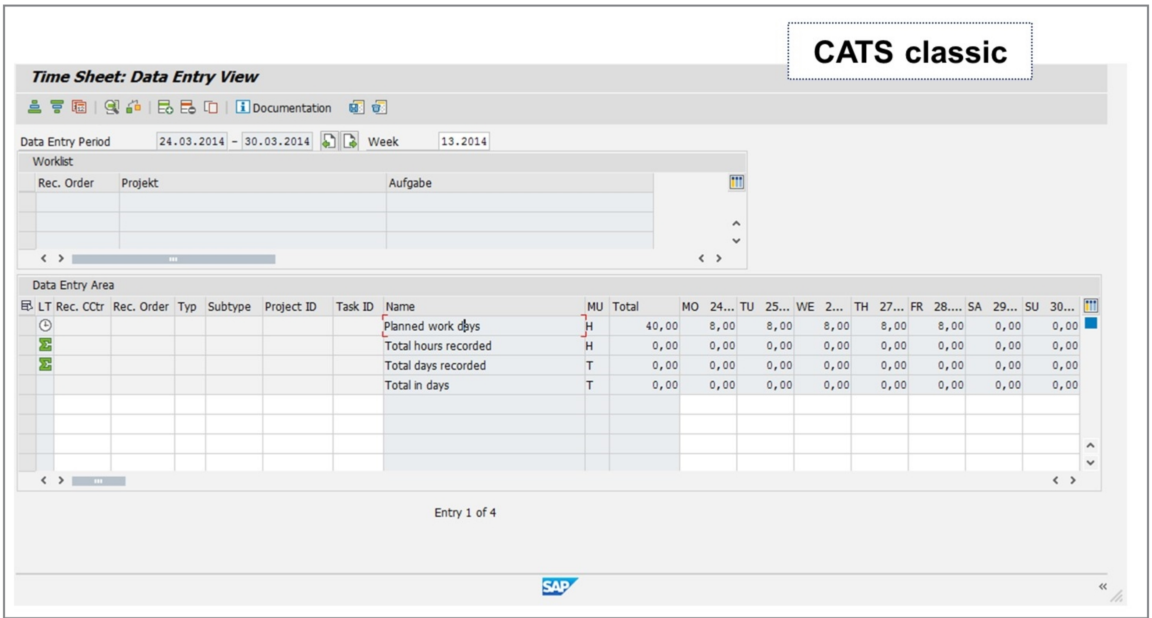

Figure 109: Standalone User Interfaces

CATS Classic

CATS Classic is the original user interface of the Cross-Application Time Sheet in the SAP system. It is particularly suited to users that also use the SAP system to complete other tasks.

CATS classic is the most suitable user interface. For example, administrative assistants can enter working times for multiple personnel numbers.

CATS Regular

CATS Regular offers a similar data entry screen and comparable functions to CATS classic. However, this user interface has been optimized for use as an Employee Self-Service (ESS) application in a Web browser.

CATS Notebook

The data entry screen for CATS Notebook is similar to that of CATS classic and CATS regular. CATS notebook also runs in the Web browser. CATS notebook is designed for use with notebooks, and is particularly suited to employees who have to travel a lot and cannot always have a connection to the SAP system to record their working times.

CATS notebook saves the working times entered in its own data store on the notebook. The next time CATS notebook is connected to the SAP system, it synchronizes this data store with the CATS database in the SAP system.

The synchronization ensures that you can change working times both in CATS notebook and in the SAP system and that the most important working time attributes are available in the input help on the notebook.

CATS Instant

CATS Instant is an iView and runs in an SAP Enterprise Portal. It enables you to enter your current tasks or working times as you go along. CATS instant is aimed primarily at users who have to record billable tasks. Such users may need to record the time they have spent on individual tasks accurately and at several times during the day.

This iView enables users to record their working times quickly and easily. A work list, from which users can choose the most important account assignment objects, is available for entering tasks.

CATS Phone

CATS Phone is a Wireless Application Protocol (WAP) application and runs on WAP-enabled cell phones. Similarly to CATS instant, it is aimed primarily at users who have to record billable tasks. In addition, it is primarily aimed at employees who have to travel a lot and visit several customers each day.

CATS phone enables these employees to enter their tasks quickly as they go along. A work list, from which users can choose the most important account assignment objects, is available for entering tasks.

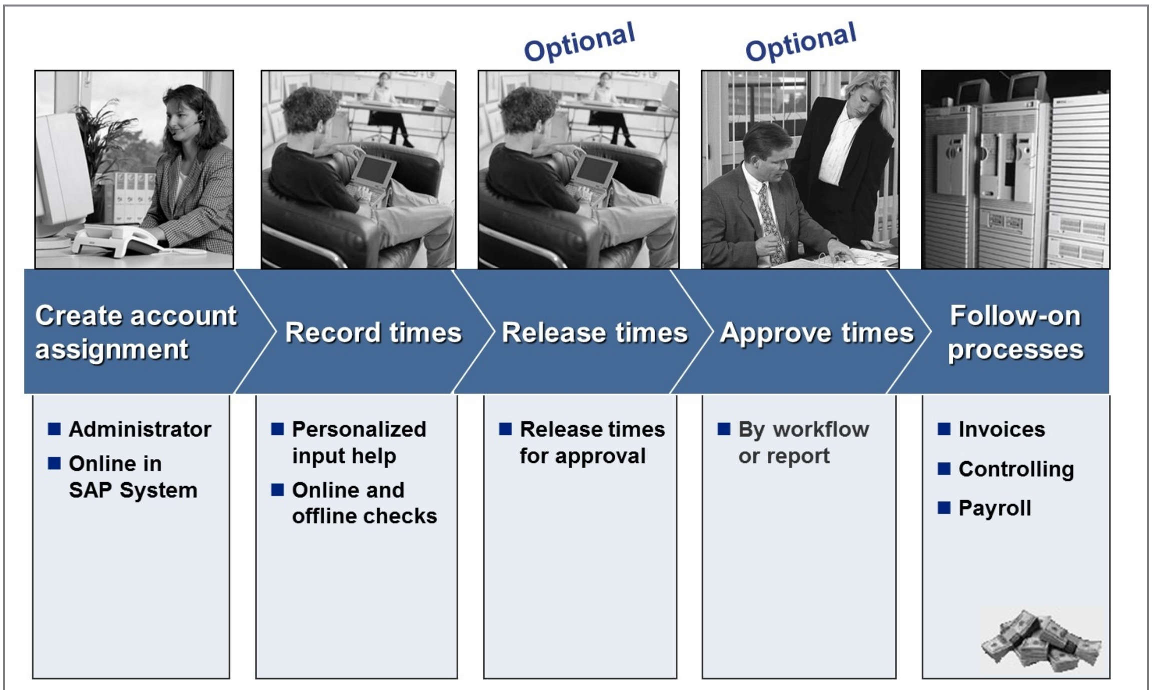

Figure 110: CATS Business Process

The process in the Cross-Application Time Sheets consists of the following steps:

1. Entry of time data in the time sheet
2. Release of time data

3. Approval of time data (also using a workflow)
4. Transfer of time data to the target component

Hint:
The steps release of time data and approval of time data are optional.

The prerequisites for working with CATS are:

Prerequisite	Purpose
Data Entry Profile	• Defines which fields are available for data entry • Defines the target applications to which data is to be transferred
HR Mini-Master	• Includes personnel number and personal data of the employees for whom data is to be entered • You can store various employee-specific default values for CATS in the Time Sheet Defaults infotype (0315).
Authorizations	• Applicable authorizations are required to permit employees to work with the time sheet • Authorizations control what the employee is able to do (for example: enter time, change time, delete time)

LESSON SUMMARY

You should now be able to:

- Enter time using the Cross-Application Time Sheet

Learning Assessment

1. Positive time management is when time data that differs from the work schedule is recorded for an employee.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. The TMW is an interface for the time administrators for maintaining time data and processing evaluation messages.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

3. Overlapping time data records are called overtime.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. The abbreviation CATS is derived from Computer Aided Time Star.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. Positive time management is when time data that differs from the work schedule is recorded for an employee.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

   Correct. With positive time management, all time is recorded for the employee.

2. The TMW is an interface for the time administrators for maintaining time data and processing evaluation messages.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

   Correct. This interface is specifically designed to meet the needs of time administrators in decentralized departments.

3. Overlapping time data records are called overtime.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

   Correct. They are called collisions.

4. The abbreviation CATS is derived from Computer Aided Time Star.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

   Correct. This abbreviation is derived from “Cross-Application Time Sheet ,”, which refers to a time data recording template that overlaps applications.

UNIT 6 Introduction to Payroll

UNIT OBJECTIVES

- Process a payroll run

Unit 6
Lesson 1

Processing Payroll

LESSON OVERVIEW

This lesson shows you how to process a payroll run.

Business Example

You are responsible for processing payroll and must be able to generate the payroll run, correct errors and finalize the output. For this reason, you need to understand the following:

- The payroll process
- Statutory and voluntary deductions

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Process a payroll run

Payroll Basics

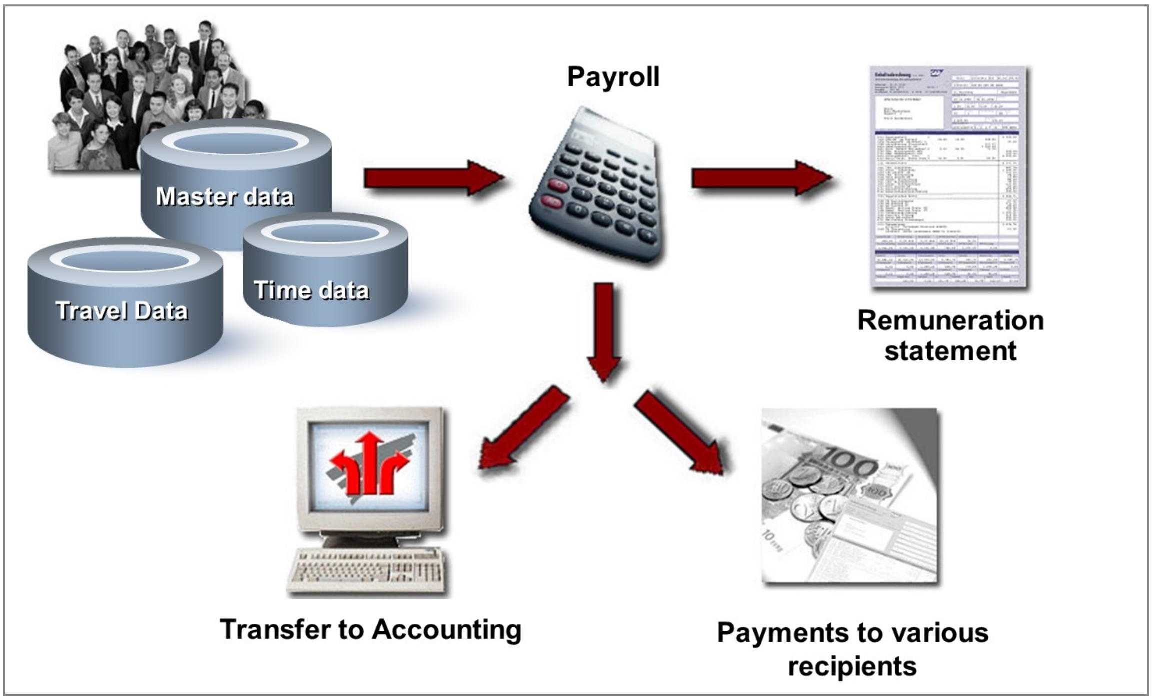

Figure 111: Payroll Accounting

Payroll accounting is the calculation of payment for work performed by each employee.

Payroll accounting includes the following activities:

Activity	Summary
Remuneration and Deduction Elements	• Create wage types for payments • Create wage types for deductions
Group Employees for processing in payroll	• Payroll Area • Payroll Control Record • Employee assignment to a payroll area
Run Payroll	• Setup payroll driver • Process gross to net payroll • Payroll log
Subsequent Activities	• Prepare remuneration statements • Transfer values to finance/controlling areas • Process payments to vendors (such as tax remittances, benefit payments, social club, pension deductions) • Bank transfers • Check printing

Payroll accounting includes a number of work processes, including the generation of payroll results and remuneration statements, bank transfers, and check payments.

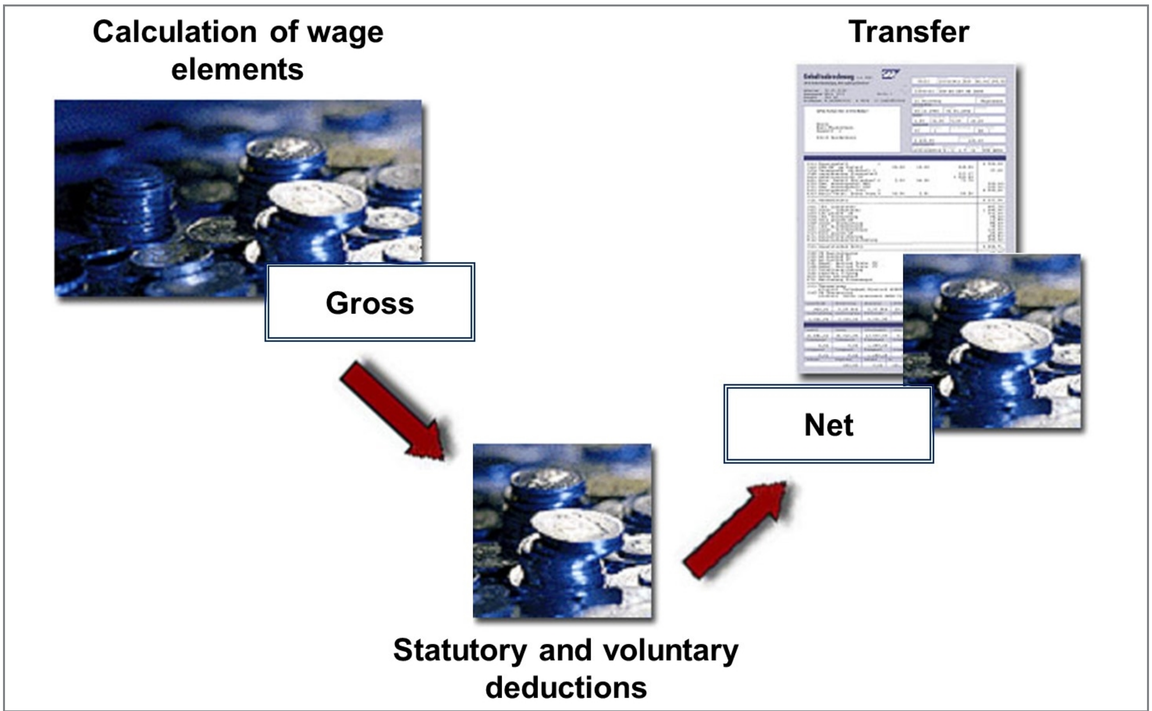

Figure 112: Overview of the Payroll Procedure

> Note:
> A wage type could be a payment or a deduction.

Remuneration and Deduction Elements

The calculation of employee payments includes two main steps:

- Calculation of remuneration elements consists of all wage types calculated during a payroll period (such as basic pay, shift premium, gratuities, leave, bonuses)
- Statutory and voluntary country-specific deductions (such as tax, employment insurance, pension, loans, benefits)

Both remuneration elements and statutory and voluntary deductions consist of individual payments and deductions that are calculated for an employee during a payroll run.

Group Employees for Processing in Payroll

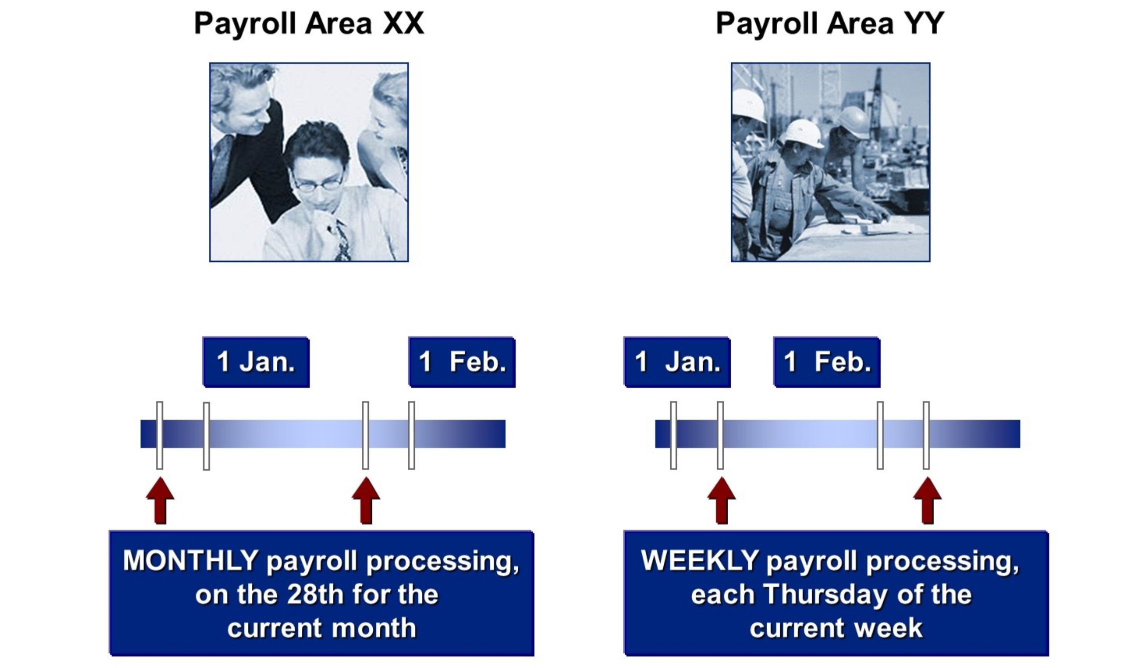

Figure 113: Payroll Areas

Payroll accounting is usually performed separately for different groups of employees. For example, you run payroll for one group of employees at the end of the month for the current month, while for another group, you run payroll on a weekday for the previous week. Payroll areas are used to group employees. A payroll area determines the exact dates of the payroll period and the exact date of the payment.

Employees are assigned to a payroll area on the Organizational Assignment infotype (0001).

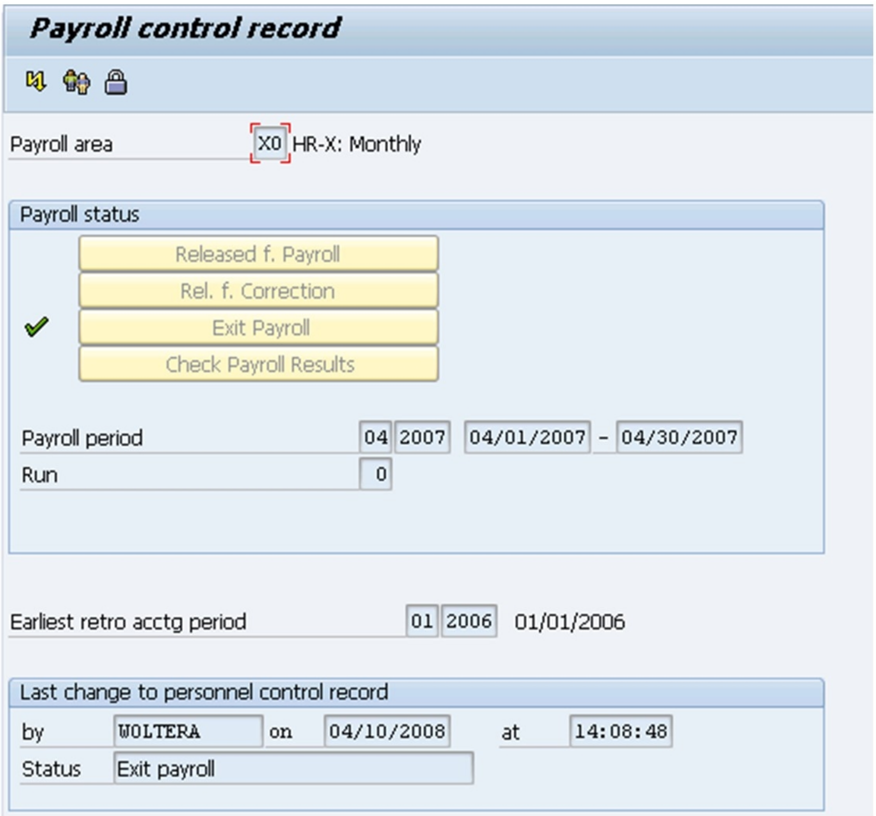

Figure 114: Payroll Control Record

A Payroll Control Record is created for each payroll area and displays the status of the payroll (released, open for corrections, exited or ready to check). The payroll control record controls the payroll process for this specific payroll area.

A payroll control record includes the following functions:

Status of Payroll Control Record	Action Executed
Release payroll	Locks payroll relevant master data records for all employees in the payroll area for the current payroll plus past payrolls (to allow for retroactive adjustments)
Start payroll	The payroll program is started and the status of the payroll control record remains released for payroll
Check result	Master data records remain locked but are available for input verification
Corrections	Master data records are released for corrections
Exit payroll	Payroll is complete for the specific pay period

Additional areas on the payroll control record include the following:

Payroll Period

The Payroll Period section of the control record provides the exact dates of the last completed payroll.

Earliest Retro Accounting Period

The Earliest Retro Accounting Period, is a mandatory field, which controls how far in the past payroll may be processed for employees assigned to the payroll area. This is one of two fields, which have an impact on retroactive payroll. The other field, which can impact retroactive adjustments is found on the Payroll Status infotype (0003) at the employee level. This is not a mandatory field and may be left blank. If dates are recorded on both the payroll control record for the payroll area and the payroll status infotype for an employee assigned to that payroll area, payroll retroactivity is processed back to the most recent date.

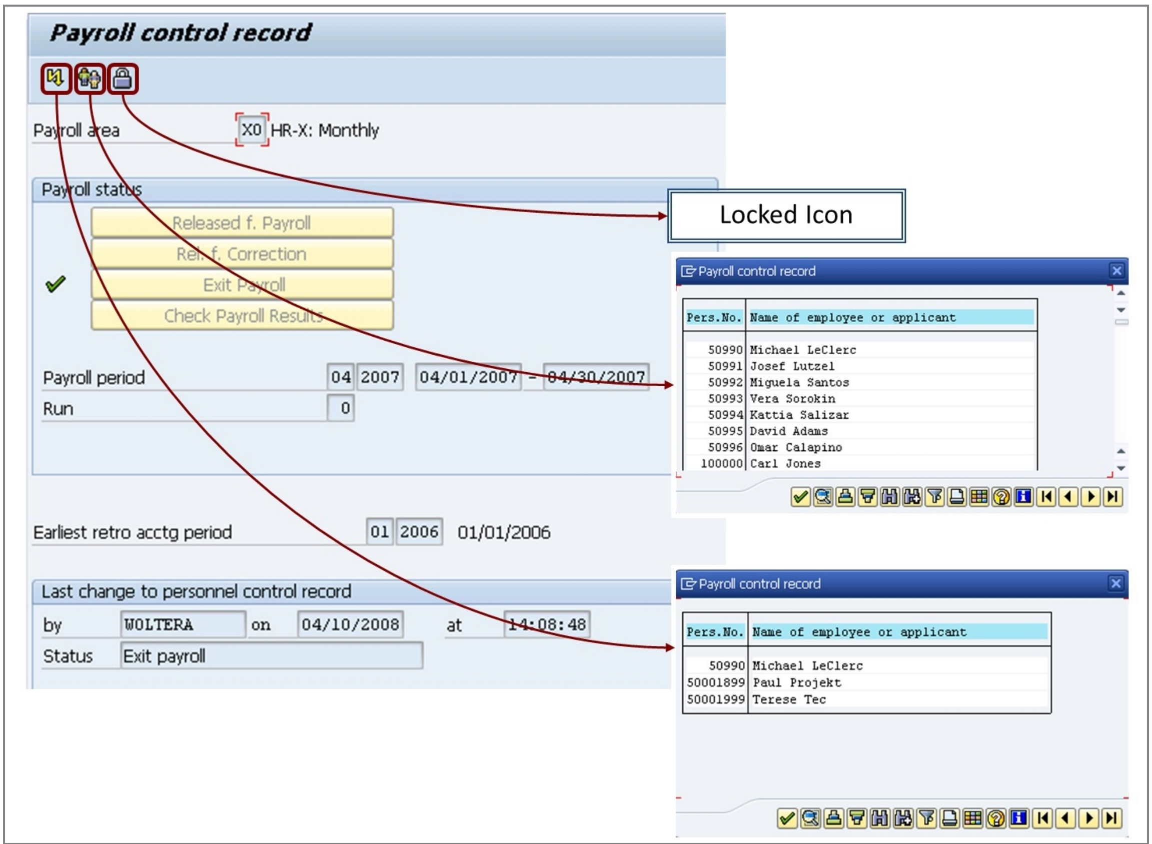

Figure 115: Payroll Control Record: Additional Information

The payroll control record provides additional information regarding the payroll.

The icons at the top left of the payroll control record provide the following details regarding the current payroll run:

Incorrect Personnel Numbers

Select this icon to display a list of employees with errors to be corrected.

List Personnel Numbers

Select this icon to display a list of all employees assigned to the payroll area.

Locked Personnel Numbers

If an employees record cannot be locked when payroll is released, that individual is skipped during payroll processing. Select this icon to view a list of locked employees.

Run Payroll

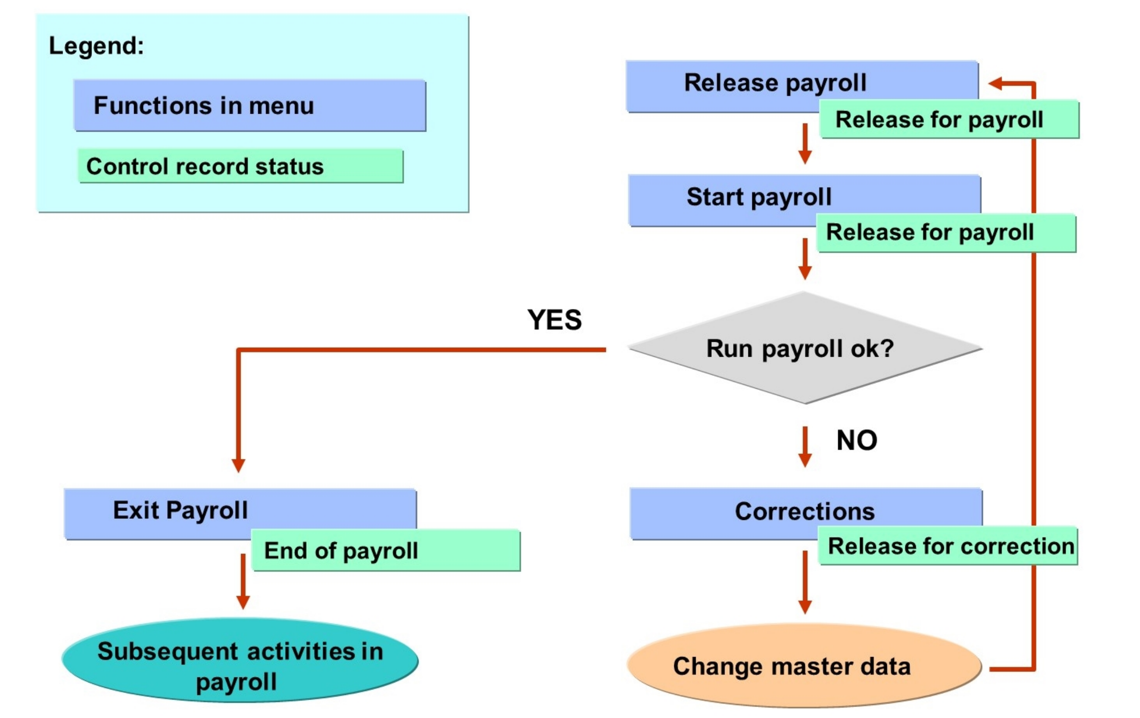

Figure 116: Overview of Payroll Process

A payroll run includes the following steps:

1. Release Payroll: Locks master data for employees in the selected payroll area for the current payroll period as well as past payroll periods (to allow for the calculation of retroactive adjustments). Master data and time data infotypes are read during the payroll process and this requires the locking of master data records.
2. Start Payroll: The personnel numbers to be included in the payroll run are selected by specifying a payroll area on the payroll driver selection screen. The payroll period is transferred directly from the payroll control record to the payroll program. Payroll is executed during this step.
3. Corrections: Payroll results are reviewed and errors are corrected by opening payroll for corrections. Once done, the payroll process is started again.
4. Exit: Once payroll has been verified and is correct, the payroll is completed and exited for the period processed. Master data records are unlocked.

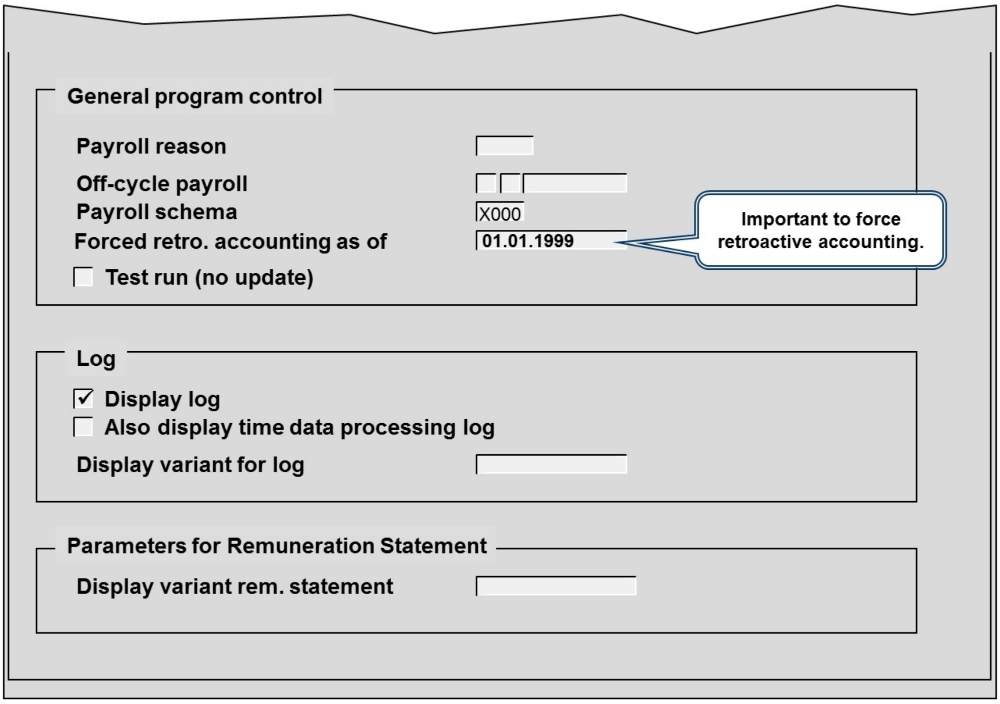

Figure 117: Payroll Driver Selection Screen

In a live payroll run, the system determines the payroll period. The last period to be included in a payroll run is stored in the payroll control record for each payroll area. The current payroll period is the last period to be included in a payroll run, plus one.

Note:
The earliest retroactive accounting period when Human Capital Management is implemented for the first time is usually the date the company goes live.

Hint:
Payroll driver should be started by Personnel Number or Payroll Area only. Even if using Personnel Number, include the appropriate Payroll Areas in the selection area.

The payroll log has a table of contents in the form of a tree structure. You can access specific detailed information from the nodes in the tree structure. Detailed headers enable you to search successfully for errors and facilitate navigation within the log information. You can elect to display or hide individual tree structure nodes.

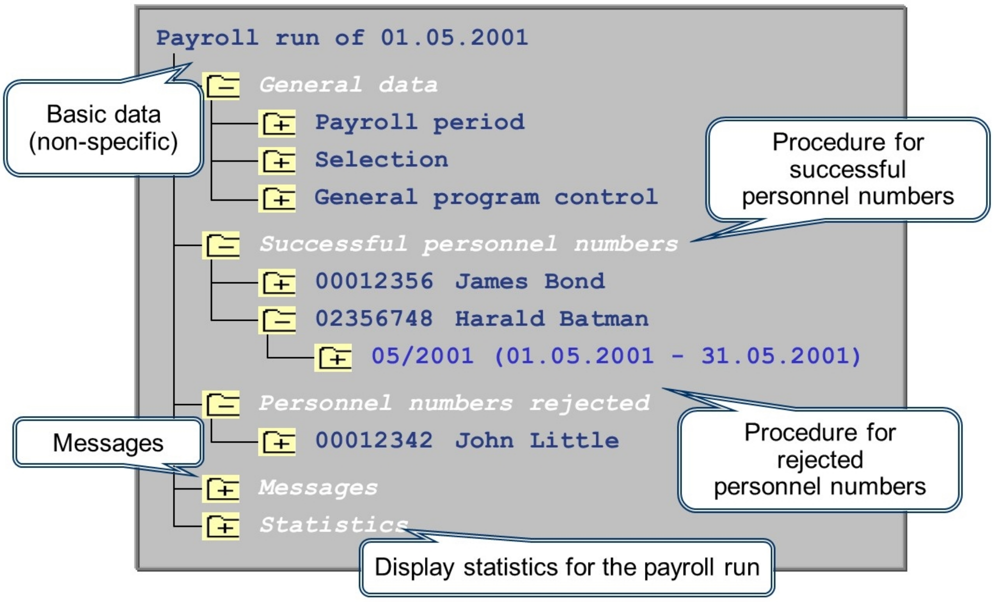

Figure 118: Payroll Log

Note:
The log is temporary and is available only as long as you are viewing it. If you exit the log, you have to rerun the payroll to reproduce it.

Results are stored in the system, but the processing steps are not.

During the payroll run, the system recognizes any errors in master data and time data. This could mean that data is missing or incorrect. Payroll can be run successfully for error-free personnel numbers. Payroll Status Infotype > infotype Payroll Status > Payroll Accounting Payroll Status Infotype > A correction indicator is assigned in the Payroll Status infotype (0003) to personnel numbers with errors.

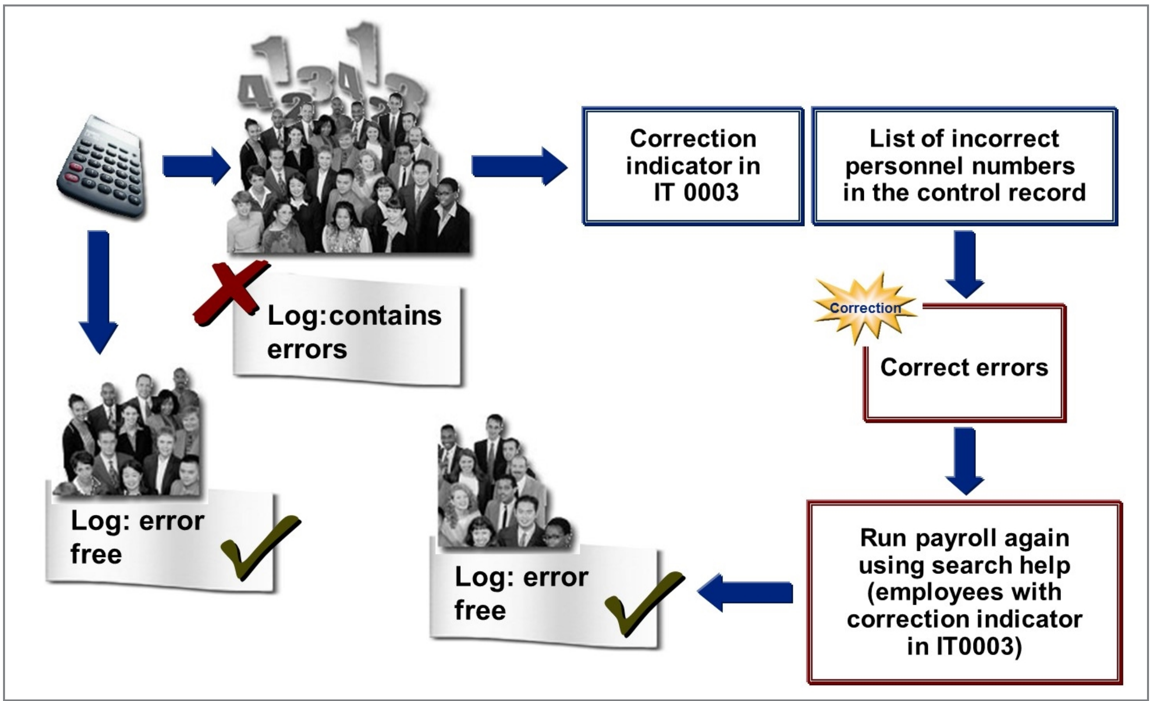

Figure 119: Correcting Incorrect Personnel Numbers

Personnel numbers with errors are listed in the payroll log. You can also call up and print these personnel numbers using the control record.

Once the payroll errors have been corrected, you can repeat the payroll run. This time run payroll using the Search Help functionality (Payroll correction run: match code W). This ensures that only the personnel numbers that have a correction indicator assigned to them in the Payroll Status infotype (0003) are selected.

Subsequent Activities Remuneration Statement

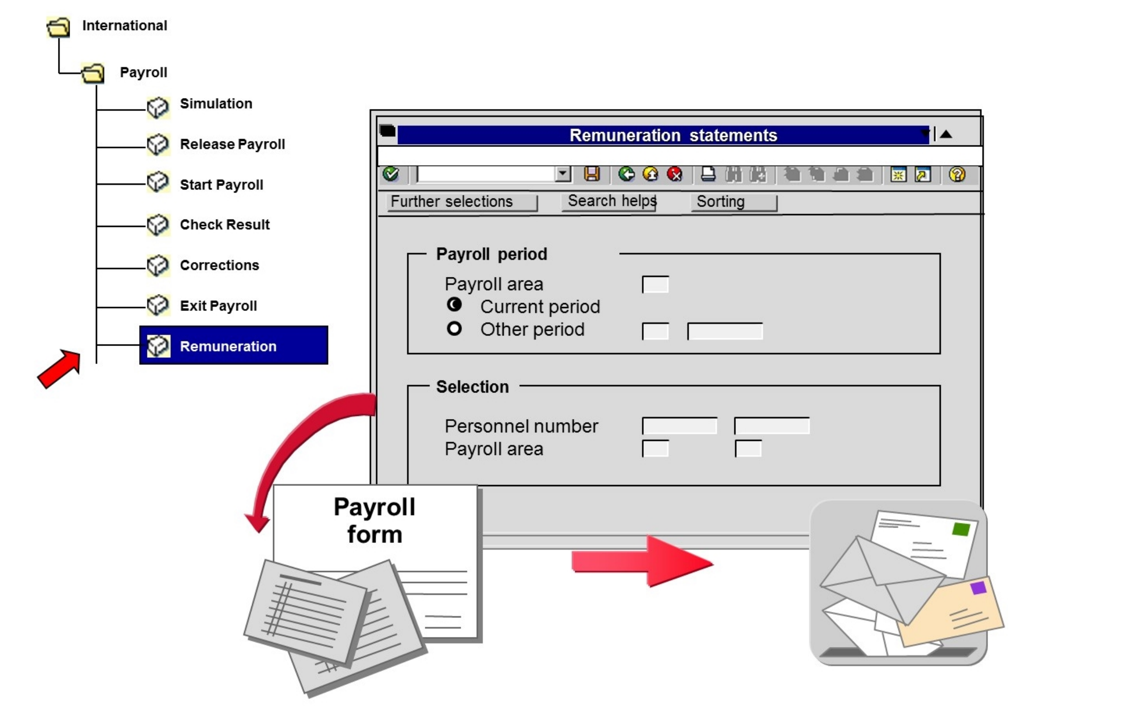

Figure 120: Remuneration Statement

SAP Payroll enables you to create remuneration statements for your employees. The remuneration statement clearly lists all payments and deductions used in the payroll run for an employee.

>Payroll Accounting remuneration statement > The remuneration statement is usually created after a payroll run and before the net pay amount is transferred to the bank.

Alternatively, employees can use Employee Self Service (ESS) to view their remuneration statement.

All subsequent activities take place when the payroll run, remuneration statement, and wage and salary transfer activities are complete.

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LESSON SUMMARY

You should now be able to:

- Process a payroll run

Learning Assessment

1. List the main steps of the payroll process run.

2. What does Release payroll do to the master data records?

3. The Payroll log provides you with a permanent record of an individual's payroll processing.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

4. If Employee Self-Service is implemented, employees may be responsible for creation and maintenance of the following Payroll related information: mailing address, tax information, and bank deposit information.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. List the main steps of the payroll process run.

   Release payroll, Start Payroll, Run payroll, Check Results, Corrections, and Exit payroll.

2. What does Release payroll do to the master data records?

   The employee records become locked for past or current processing.

3. The Payroll log provides you with a permanent record of an individual's payroll processing.

   Determine whether this statement is true or false.

   [ ] True

   [X] False

   Correct. The Payroll log is temporary and can be analyzed only as long as you view the log. Permanent records of input and results tables are in *SAP Easy Access Menu* → *Human Resources* → *Payroll* → *International tools* → *Display results* . Enter the personnel number of the employee and select any payroll run to display the information about that run.

4. If Employee Self-Service is implemented, employees may be responsible for creation and maintenance of the following Payroll related information: mailing address, tax information, and bank deposit information.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

   Correct. This statement is true.

UNIT 7 Personnel Development

UNIT OBJECTIVES

- Maintain the qualification catalog
- Create person and position profiles
- Execute a profile match-up

Unit 7
Lesson 1

Maintaining the Qualification Catalog

LESSON OVERVIEW

This lesson shows you how to maintain the qualification catalog.

Business Example

As the talent Management Specialist, you are responsible for mainting qualifications for employees and positions within your compnay. For this reason, you require the following information:

- A good understanding of qualifications and requirements
- A good understanding of the qualifications catalog

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Maintain the qualification catalog

Qualification Catalog

The personnel development function can help you plan and implement specific personnel and training measures to promote the professional development of your employees. You can also increase your employees' motivation and job satisfaction by considering their preferences and suitability for positions. One of the goals of personnel development is to ensure your organization has the qualifications and skills it needs in all fields. This is achieved by maintaining a qualification catalog and preparing qualification evaluations for positions and employees.

A translation function allows you to use the qualifications catalog in different languages.

Personnel development needs can be determined by comparing current and future position requirements with existing employee qualifications and taking into consideration the development preferences of the employees.

Development measures can be geared towards scenarios such as:

- Retaining existing employees
- Enhancing skills and abilities of existing employees
- Filling the gap between position requirements and employee abilities as identified in a performance assessment
- Ensuring employees keep pace with technological developments

Positions have specific requirements that must be met, and employees possess certain qualifications. These requirements and qualifications are stored in the qualifications catalog.

Structure of the Qualification Catalog

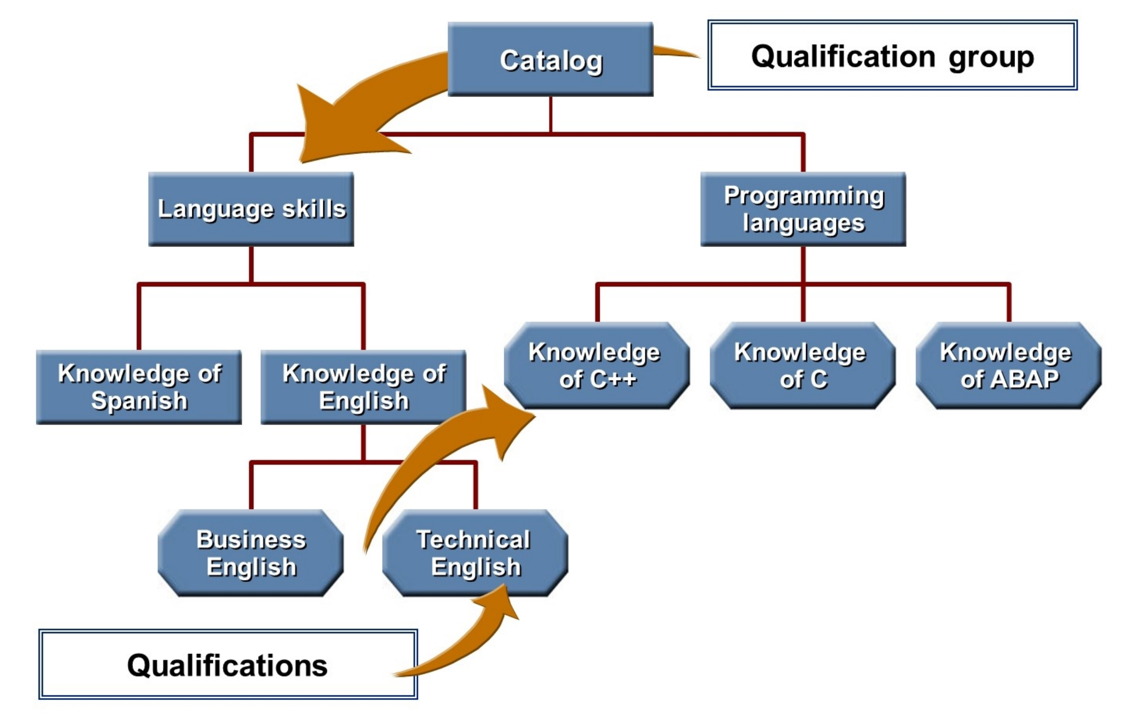


Figure 121: Qualifications Catalog

Qualifications can also contain further qualifications. Qualifications are related to persons, jobs, and positions.

You can create your own quality scales to rate the proficiency of qualifications. The user defines the number of entries in a scale and the proficiency texts to be used.

You must assign a proficiency scale to each qualification group. This scale is inherited by the qualifications in the group.

The proficiency of the scales can be given individual descriptions for every qualification/ qualification group in the qualifications catalog. These proficiency descriptions are then available when you edit qualifications and requirements descriptions (as well as for appraisals).

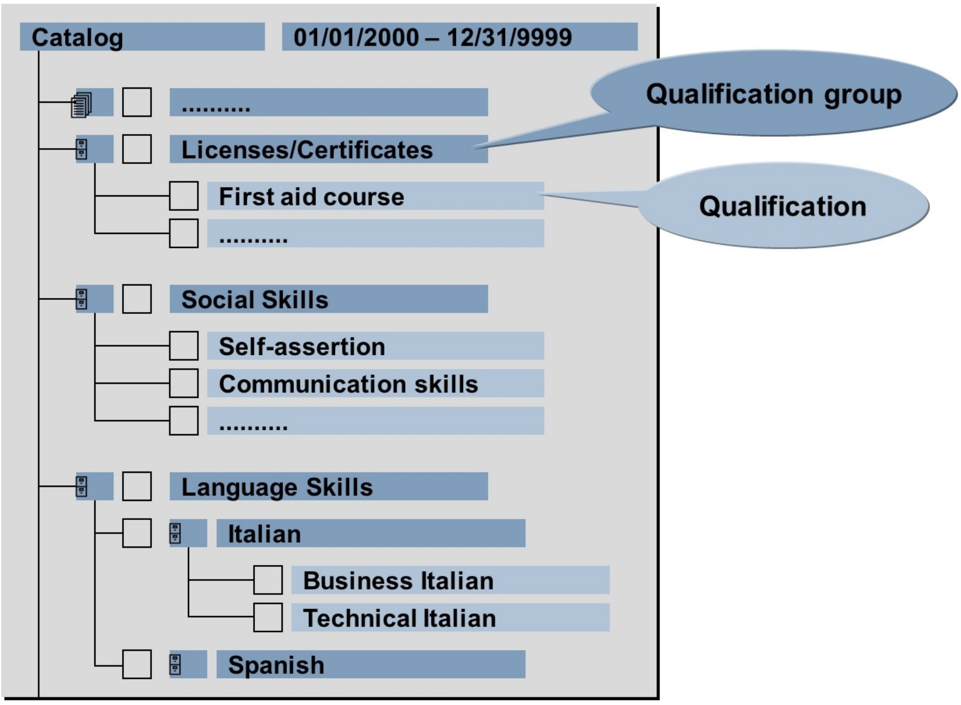


Figure 122: Structure of the Qualifications Catalog

In the qualifications catalog, qualifications that are similar are grouped into qualification groups which structure the qualification catalog. Qualification groups (object type QK) can contain qualifications and additional qualification groups. Qualifications (object type Q) can also contain additional qualifications. Qualifications are assigned to objects such as persons or candidates.

An example of a qualification catalog is as follows:

Qualification Group	Qualification Group	Qualification
Language Skills	Italian	Business Italian
	Italian	Technical Italian
	Spanish	Business Spanish
	Spanish	Technical Spanish

Example:

The qualification group Language Skills contains the qualification groups Italian and Spanish. The qualification group Spanish contains the qualifications Business Spanish and Technical Spanish.

If you want to create a qualification group, you must first have defined at least one proficiency scale.

You can display a where-used list for qualification groups and qualifications. The where-used list displays all of the objects to which the original object has a relationship. You should always generate a where-used list before you delete an object to ensure data consistency.

Assign Quality Scales

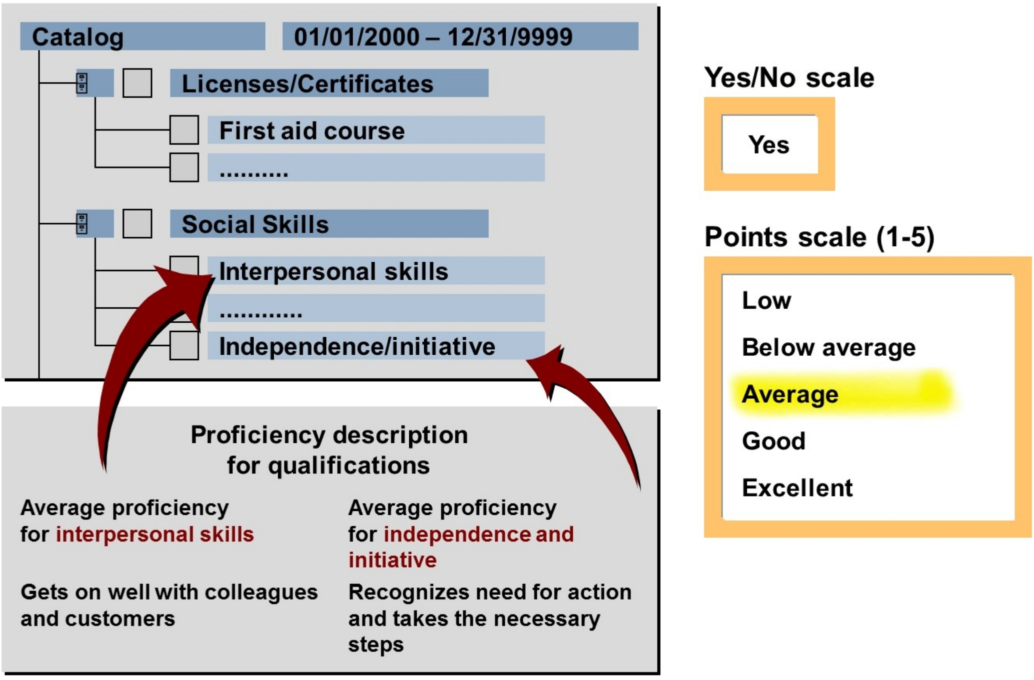


Figure 123: Assigning Quality Scales

Qualifications are rated by means of proficiency scales (quality scales). To rate the proficiency of a qualification, you create a quality scale. You determine to you how many ratings are included on this scale and what they are called.

An example of a scale to measure a proficiency is as follows:

- Languages could include the proficiencies of:.
  - Basic Knowledge
  - Satisfactory
  - Fluent
  - Native Speaker
- A scale to indicate whether or not the individual has a drivers license could have the proficiencies of:
  - Yes
  - No

Quality scales are assigned to qualification groups (not qualifications). A quality scale must be assigned to each qualification group. This scale is then assigned automatically to all the qualifications belonging to this group.

If qualification groups with different quality scales are arranged hierarchically, the qualifications of the various groups are always assigned the scale of the directly superior qualification group.

Additional Qualification Data

Qualifications may have a depreciation meter, alternative qualifications, and a validity period to allow you to provide further definition to your objects.

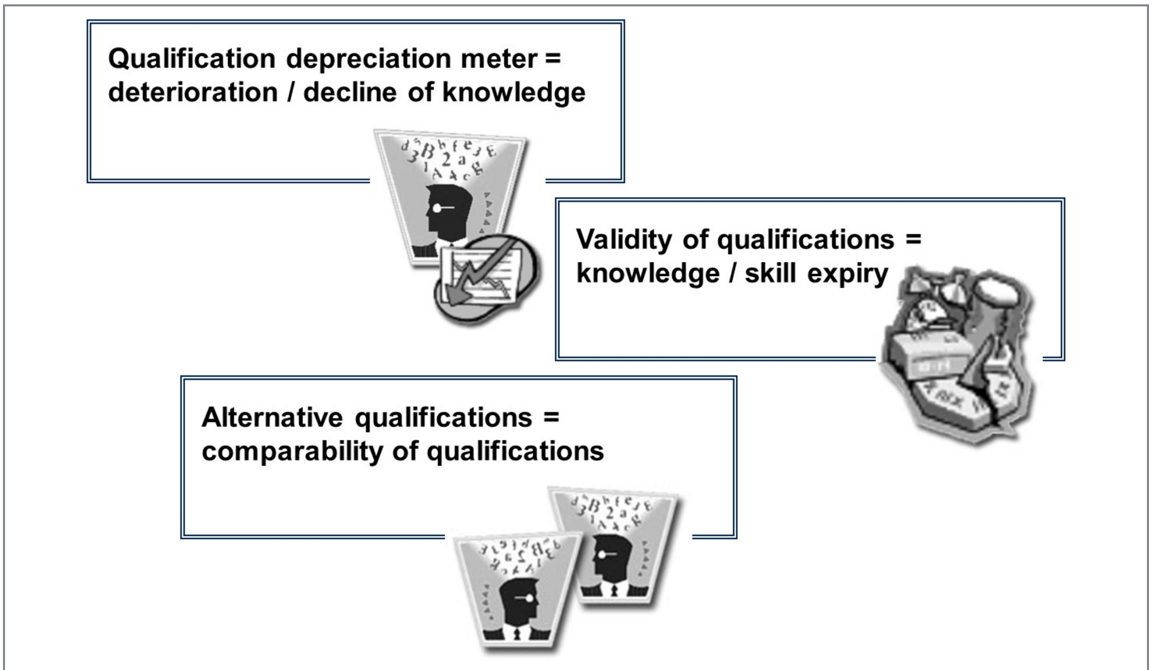


Figure 124: Additional Qualification Data

A depreciation meter allows you to simulate in the system the fact that, over time, employees forget certain skills. For example, if the position an employee holds does not require one of the skills the employee has, for example C++, the employee's ability to work with C++, will decline over time. You indicate how the reduction of employee skills will be handled by the depreciation meter.

Qualifications may also have a validity period. At the end of this period, the qualification will expire. For example, a first aid certificate may be valid for 2 years after which it must be renewed. If the certificate is not renewed, the qualification is removed from the employees profile. You can track qualifications with validity periods and ensure follow up training is delivered.

Alternative qualifications must have the same proficiency scale and are considered to be equivalent to others in the suitability percentage specified. You can assign one or more alternative qualifications to a qualification and the relationship is automatically two-way. You can define a percentage value specifying the extent to which one qualification can replace another.

Qualifications and Requirements

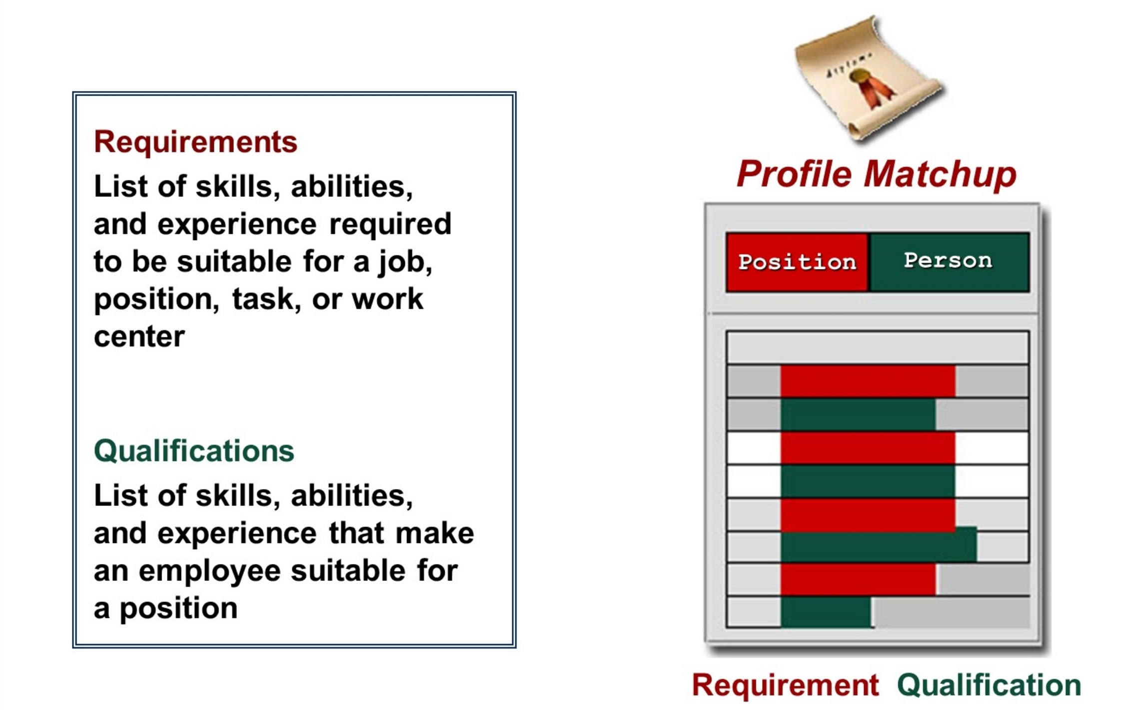


Figure 125: Qualifications/Requirements

You can assign qualifications to employees and positions. Employees possess qualifications and positions have requirements. All qualifications (and requirements) are stored centrally in a catalog. Both refer to the same object but from a different perspective.

Requirements and qualifications are stored in profiles, which are compared with one another. This comparison is used to determine if the individual is well suited for the particular position or if training or development could be used to resolve any deficiencies between the position requirements and the individual's qualifications.

Integration of Personnel Development with SAP Components

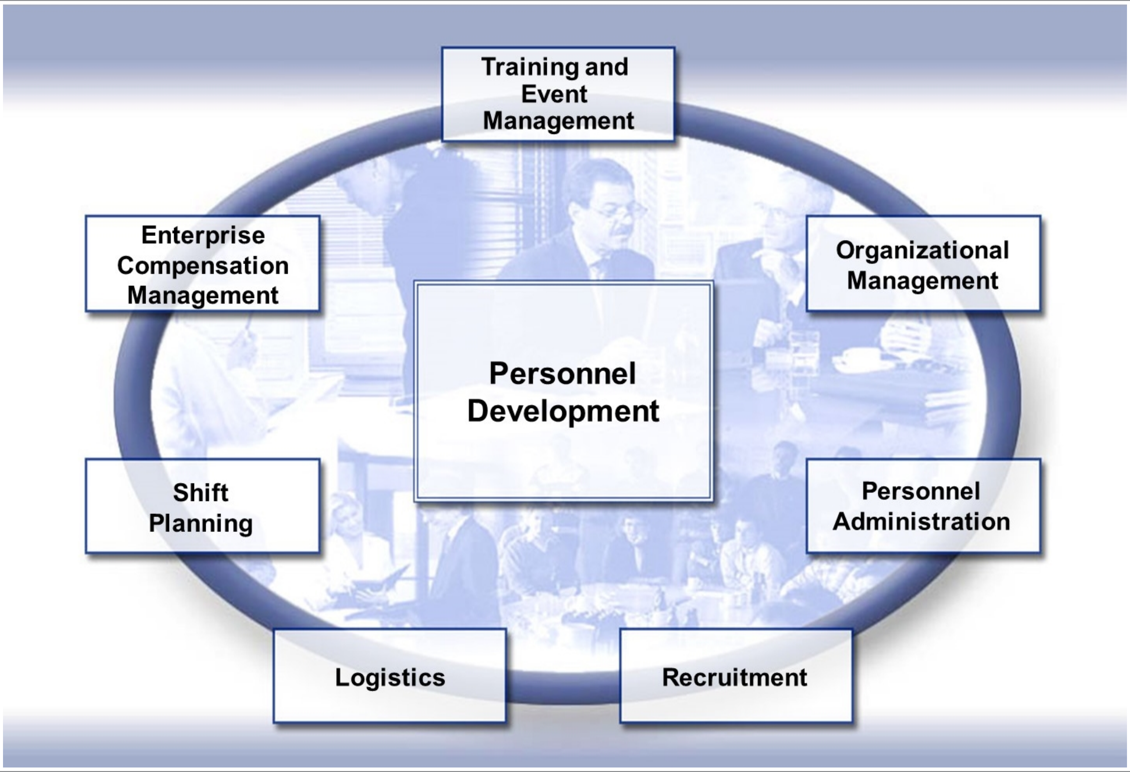


Figure 126: Points of Integration in Personnel Development

Personnel Development is integrated with the following:

Organizational Management:

Integration with Organizational Management allows you to access objects within the organizational structure. for example positions. If you want to use Personnel Development effectively, you should also implement Organizational Management.

Training and Event Management

Integration with Training and Event Management allows the system to generate training proposals based on the results of a profile match-up. You can also book the employee into business events and create prebookings for business event types.

Personnel Administration:

Integration with Personnel Administration allows you to use employee information (HR master data) for personnel development planning. This allows you to manage qualifications and appraisals in Personnel Development. Special integration switches are available for integrating qualifications and appraisals. Once an appraisal is completed, the resulting performance rating can be made available to Enterprise Compensation Management.

Recruitment:

If Personnel Development is integrated with E-Recruiting, you can manage applicant qualifications in Personnel Development only. This allows you to perform standardized appraisals for both candidates and employees.

Shift Planning:

Integration with Shift Planning allows you to take qualifications into account when you schedule shifts. This allows you to, for example, specify that the employees working on a specific shift should have specific qualifications.

Logistics:

In Logistics (Service Management, Production Planning, and so on), you can store work center requirements, or requirements for orders. This means that you can find suitable employees during the shift planning process by matching requirements with qualifications.

LESSON SUMMARY

You should now be able to:

- Maintain the qualification catalog

Unit 7
Lesson 2

Creating Profiles

LESSON OVERVIEW

This lesson shows you how to create person and position profiles.

Business Example

As the Talent Management Specialist, you are responsible for maintaining employee and positions profiles. For this reason, you require the following information:

- An understanding of employee and position profiles

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create person and position profiles

Person and Position Profiles

Profiles

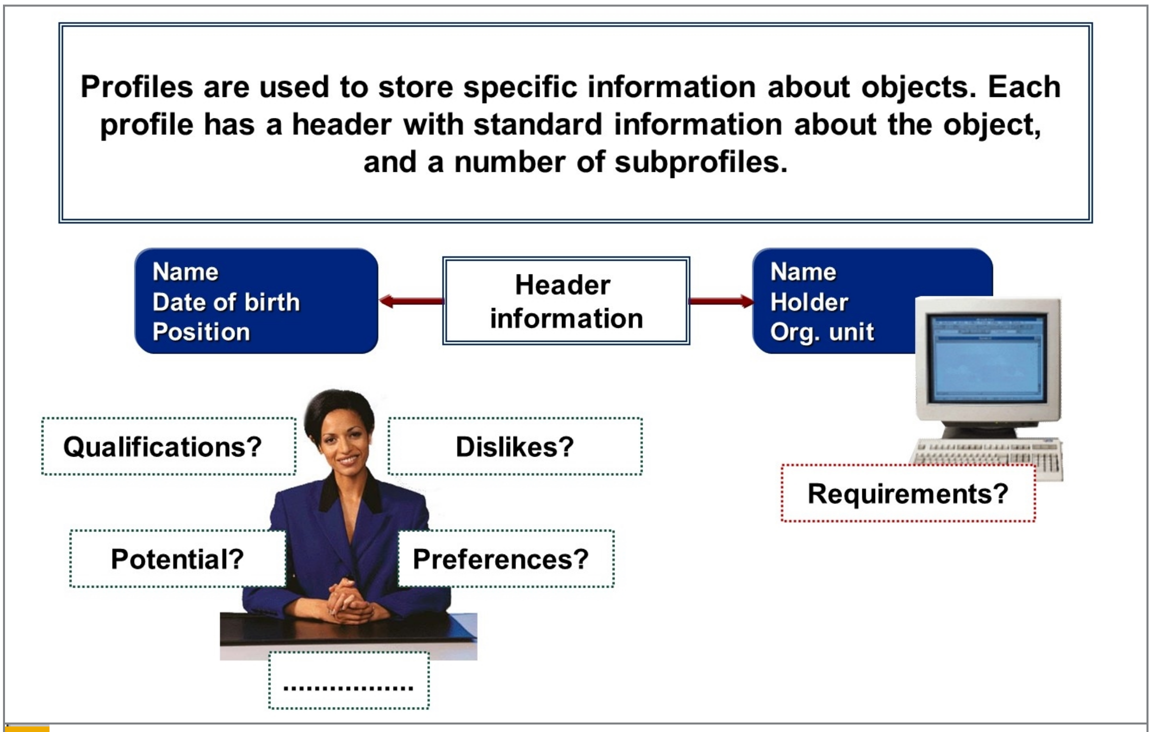


Figure 127: Profiles

Profiles are used to store information on objects such as qualifications, potentials, preferences, dislikes and requirements.

The header contains standard information on the object. For employees, this information might include the person's name, date of birth, and the position the person holds. Subprofiles contain more specific information on a particular aspect of the header. For example, a person's qualifications subprofile contains details of the person's skills and knowledge.

Profiles can be created for different object types and each object type can have a number of different subprofiles. Each profile consists of a header and a number of subprofiles.

> Hint:
> When a subprofile is changed, the workflow Changed Subprofile automatically informs the person for whom the subprofile was created of the change. All of the subprofiles in Personnel Development are included in the workflow with the exception of the subprofiles for appraisals and individual development plans.

A person has subprofiles

Qualifications | Potentials | Preferences | ....

Qualification Group	Name	Proficiency	From	To	Note
Social skills	Team spirit	Average	01/01/1998	12/31/9999	
Languages	Business Spanish	Basic knowledge	01/01/1996	12/31/9999	
Languages	Business Portuguese	Good	....	....	

Figure 128: Create profiles: Person, Applicant.

The subprofile Qualification, tracks employee or candidate skills and abilities by type and level of proficiency. You use the qualifications catalog to create a Qualifications subprofile.

The Potentials subprofile stores information regarding a person's future suitability for other positions and professional development.

The Preferences and Dislikes subprofiles store preferences relevant to a person's professional development.

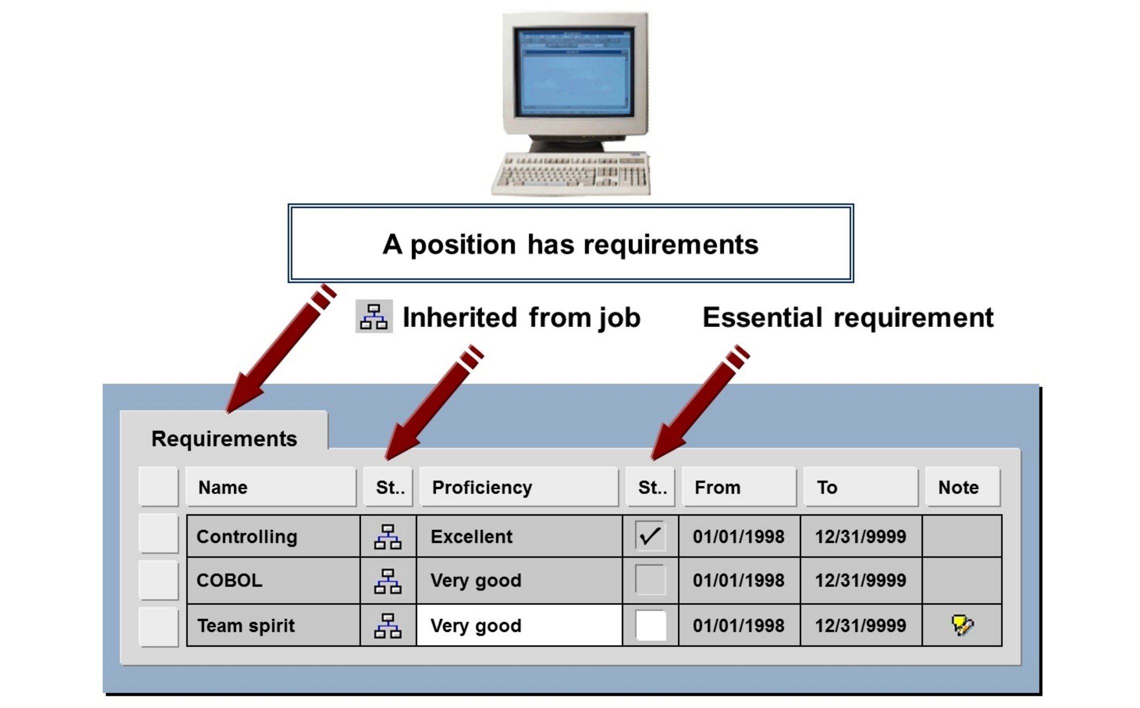


Figure 129: Create profiles: Job/position

The Requirements subprofile specifies the knowledge and skills, including the level of proficiency of the skills, required for a specific job, position, and so on. This subprofile is created using qualifications stored in the qualifications catalog, and must have a validity period. You can enter notes for each entry in the requirements subprofile.

Requirements can remain unevaluated (that is, without a specific proficiency), or you can assign them a proficiency. The scale of the qualification group to which the qualification belongs determines which proficiency you can assign to it.

You can also specify whether a requirement is essential or optional. You can consider this factor when, for example, executing a profile matchup, or during career and succession planning.

Requirements that are related to a job are inherited by positions derived from the job. You cannot delete inherited requirements from the subprofile but can assign a different proficiency or a different status.

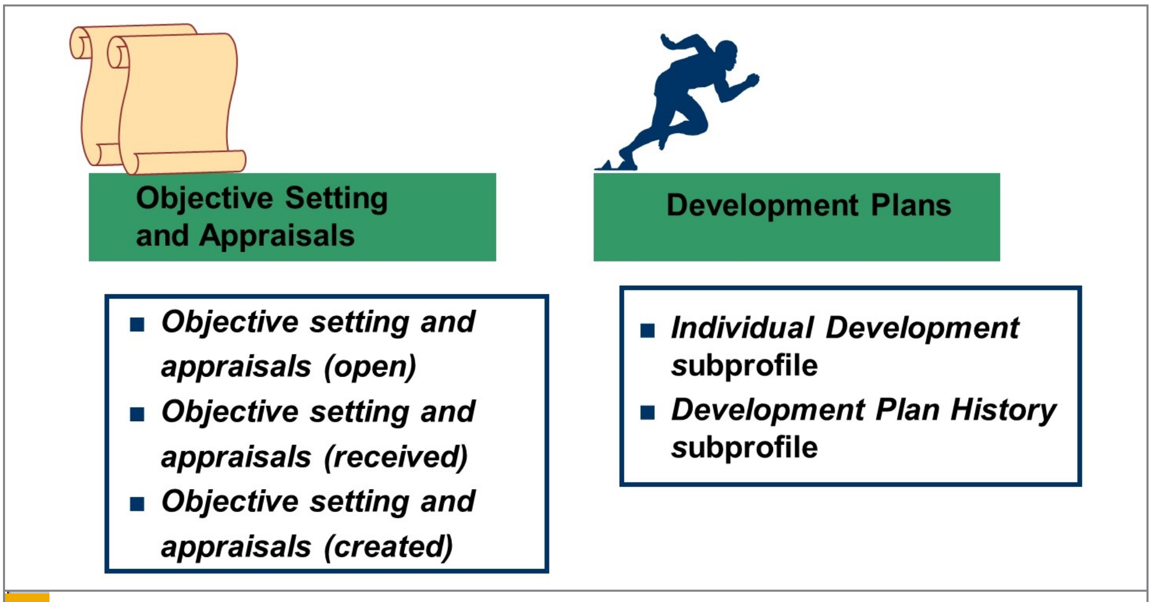


Figure 130: Additional Subprofiles

Additional subprofiles containing information on planning objects are available for use in the Appraisal Systems and Development Plans components.

Hint:
If you implement the Performance Management function, you can use the following subprofiles for appraisals:

- Objective setting and appraisals (open)
- Objective setting and appraisals (received)
- Objective setting and appraisals (created)

You learn about these subprofiles later in context.

Intranet Solution

Figure 131: Intranet Solution for Qualifications Profiles

Employee Self-Service (ESS) allows employees to view and edit their qualification profiles. Employees can select the qualifications they hold from the qualification catalog, and save them and their proficiency to their profile. Profile match-ups allow employees and management to identify areas where there are deficits and training needs.

LESSON SUMMARY

You should now be able to:

- Create person and position profiles

Unit 7
Lesson 3

Executing Profile Match-ups

LESSON OVERVIEW

This lesson shows you how to compare the profile of a position with the holder of the position.

Business Example

As the Talent Management Speciality, you are responsible for comparing position requirements with the qualifications of employees. For this reason, you require the following information:

- An understanding of how to generate a comparison between employee and position profiles

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Execute a profile match-up

Profile Match-up

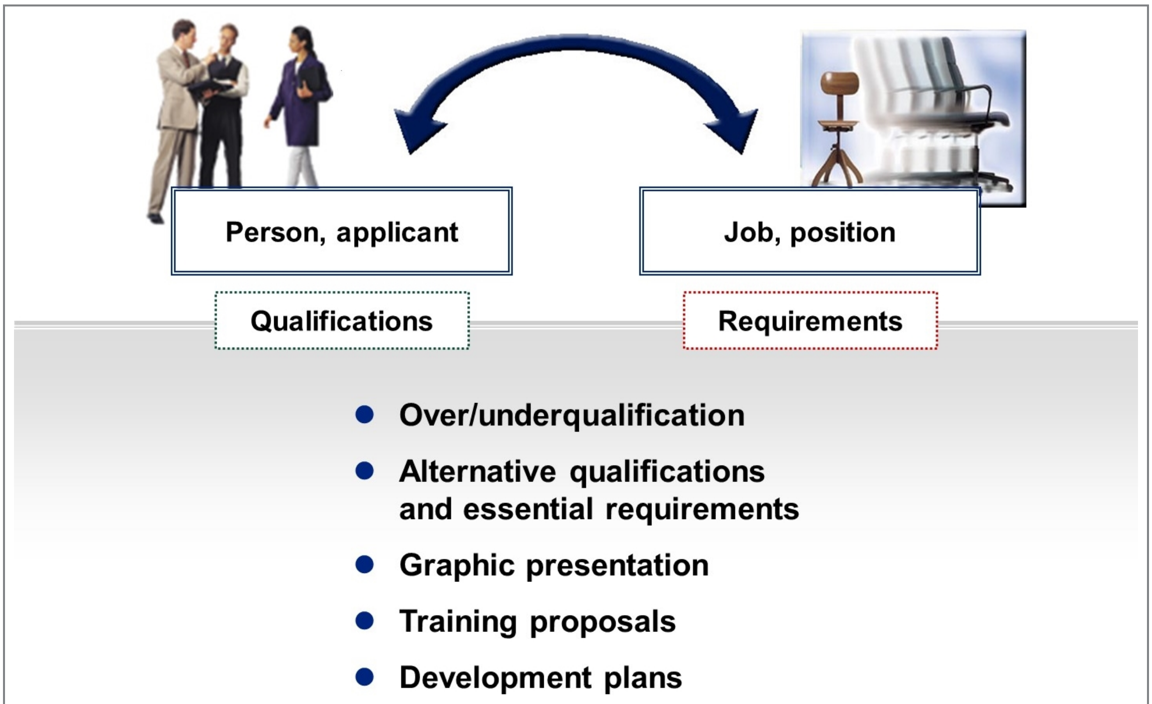


Figure 132: Profile Match-up

The profile match-up function lets you compare the qualifications and requirements of persons, jobs, and positions. Results can be displayed in a list form, for example using the SAP List Viewer or Table Control, saved as a file and printed.

When you compare qualifications with a requirement, one of the following scenarios can result:

- The qualification fulfills the requirement exactly.
- The qualification does not fulfill the requirement (the proficiency of the qualification is lower than is required, or does not exist at all).
- Over qualification (that is, the proficiency of the qualification is higher than is required).

Profile Match-Up Example

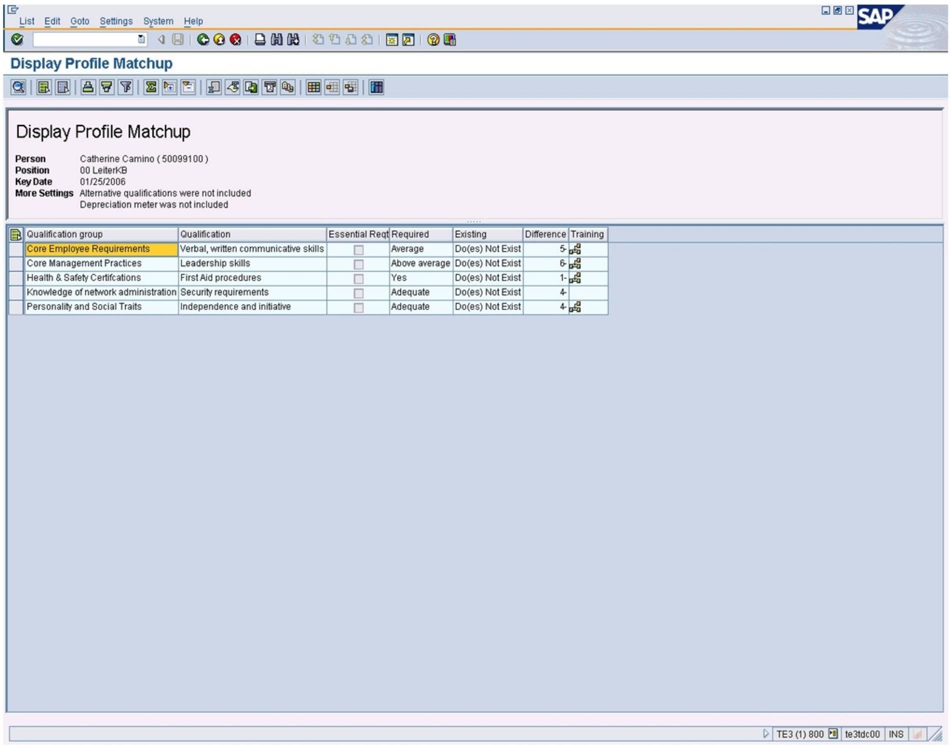


Figure 133: Profile Match-up: Example

The various scales used in profile match-ups are standardized to make comparisons easier and more accurate.

Training Proposals for Qualification Deficits

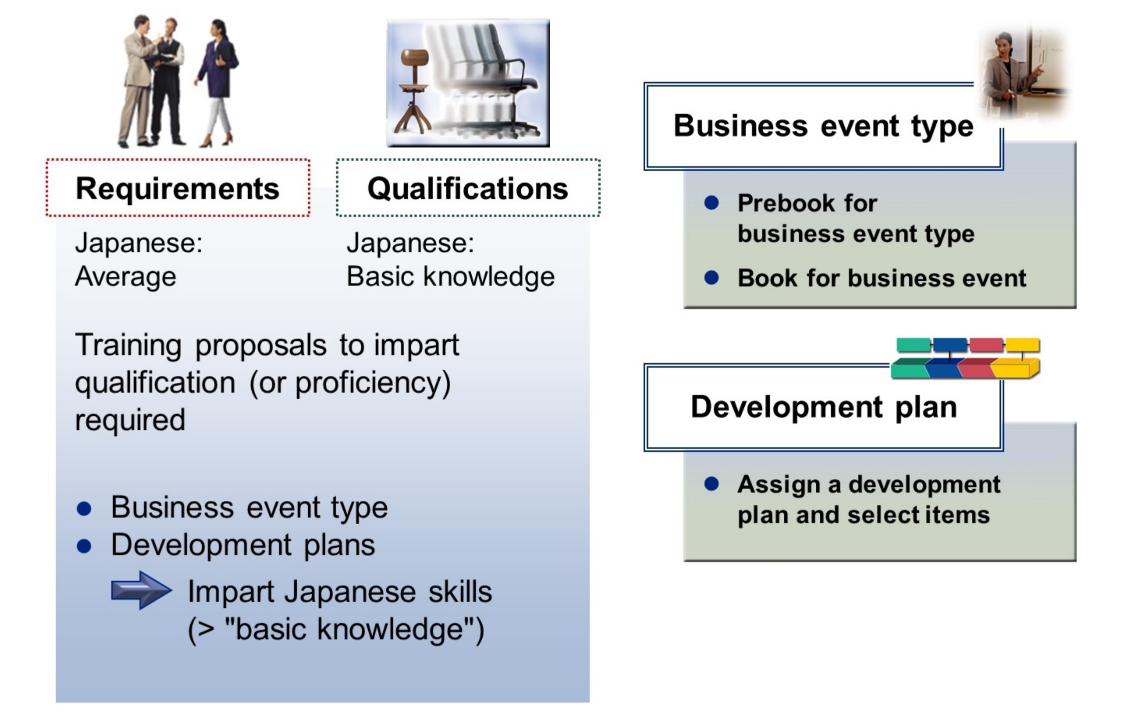


Figure 134: Training Proposals for Qualification Deficits

If Personnel Development is integrated with Training and Event Management, you can use Generate Training Proposals. The system proposes training courses (business events) that can provide any missing qualifications. You can book employees for courses directly, or alternatively pre-book them for business event types.

The system can also propose development plans that impart the required qualifications. You can assign a development plan directly, and then copy items from this general development plan to a person's individual development plan.

The system proposes only business events and development plans that result in the same or higher level of proficiency as the qualification (compared to current proficiency in the Qualifications sub-profile of the person in question).

Example of the use of a profile match-up is as follows:

- A mechanical engineer is scheduled to work in Japan in a new position.
- The profile match-up shows that the employee does not have adequate language skills.
- Since Personnel Development is integrated with Training and Event Management, the option Generate Training Proposals is executed during the profile match-up.
- The system proposes Japanese language courses that will give the engineer the required skills for the new position.
- The administrator registers the employee directly into the recommended courses.

Acquiring Qualifications

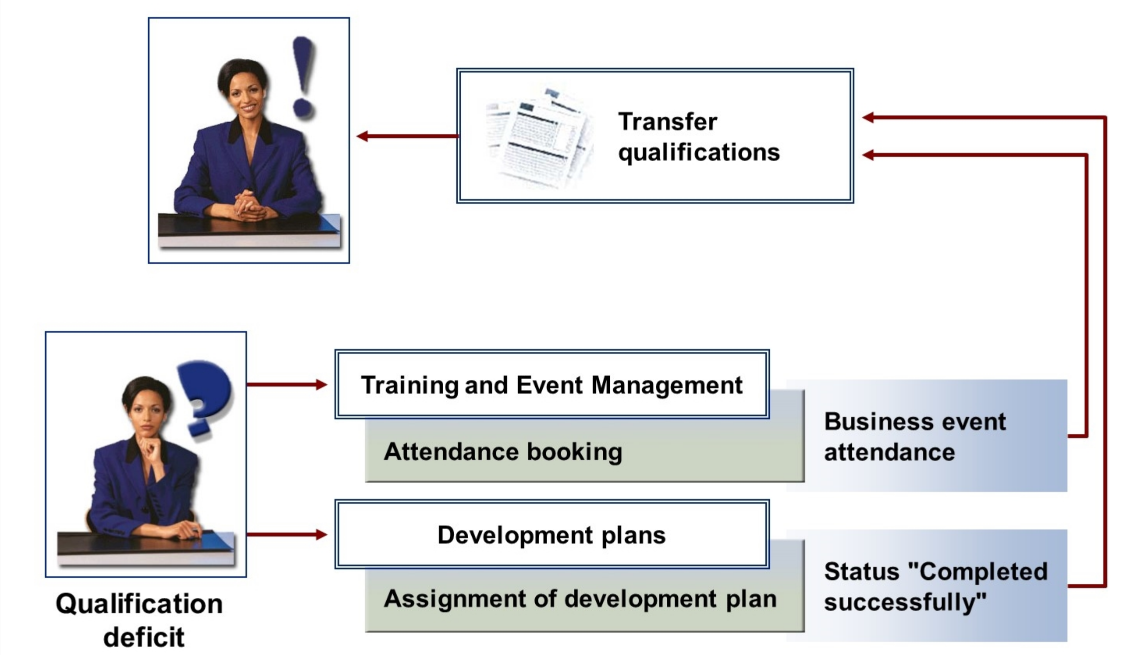


Figure 135: Acquiring Qualifications

Successfully completing a course (business event) may result in the attendees obtaining an additional qualification with a specific proficiency. During follow-up activities of the business event, the system transfers this qualification to attendee profiles.

In the standard system, if an employee successfully completes a development plan, the system can copy qualifications assigned to the development plan (and the corresponding proficiency) to the person's qualifications profile. In Customizing, you can specify whether the system should copy these qualifications automatically without intervention, or if users should confirm this operation first.

Reporting on Profiles

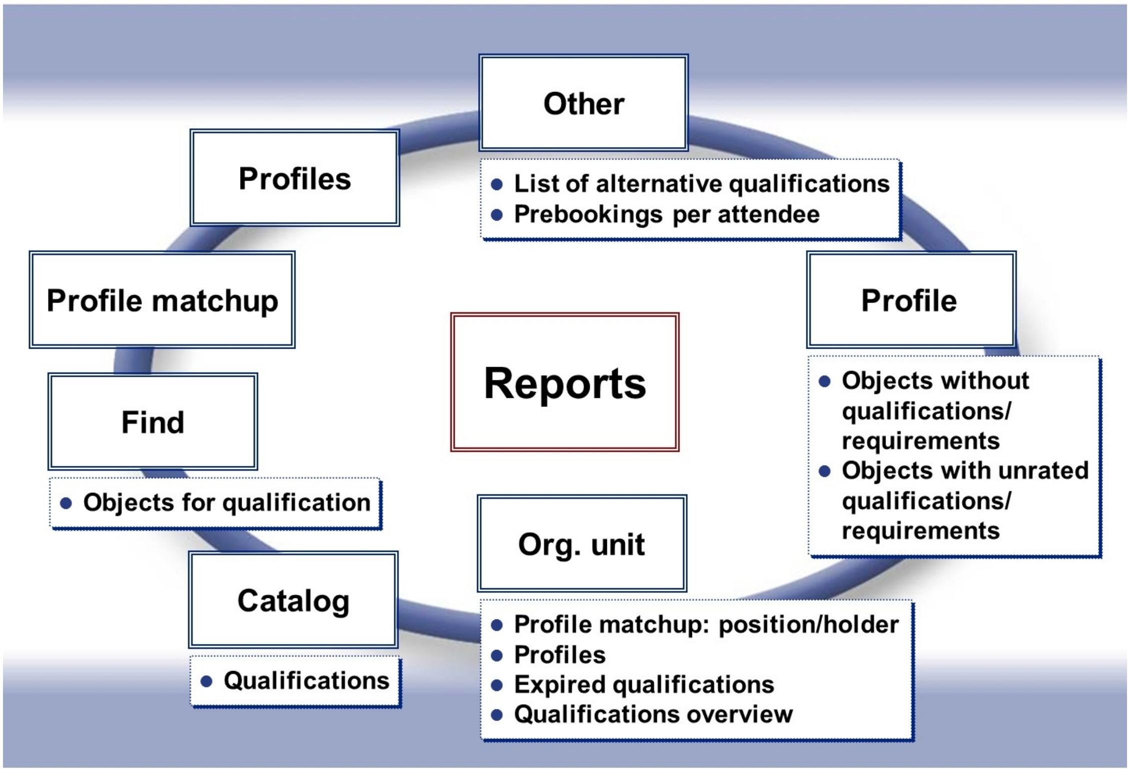


Figure 136: Qualifications and Requirements: Reporting

There are many ways to evaluate and analyze the information contained in subprofiles.

Finding Objects for Qualifications I

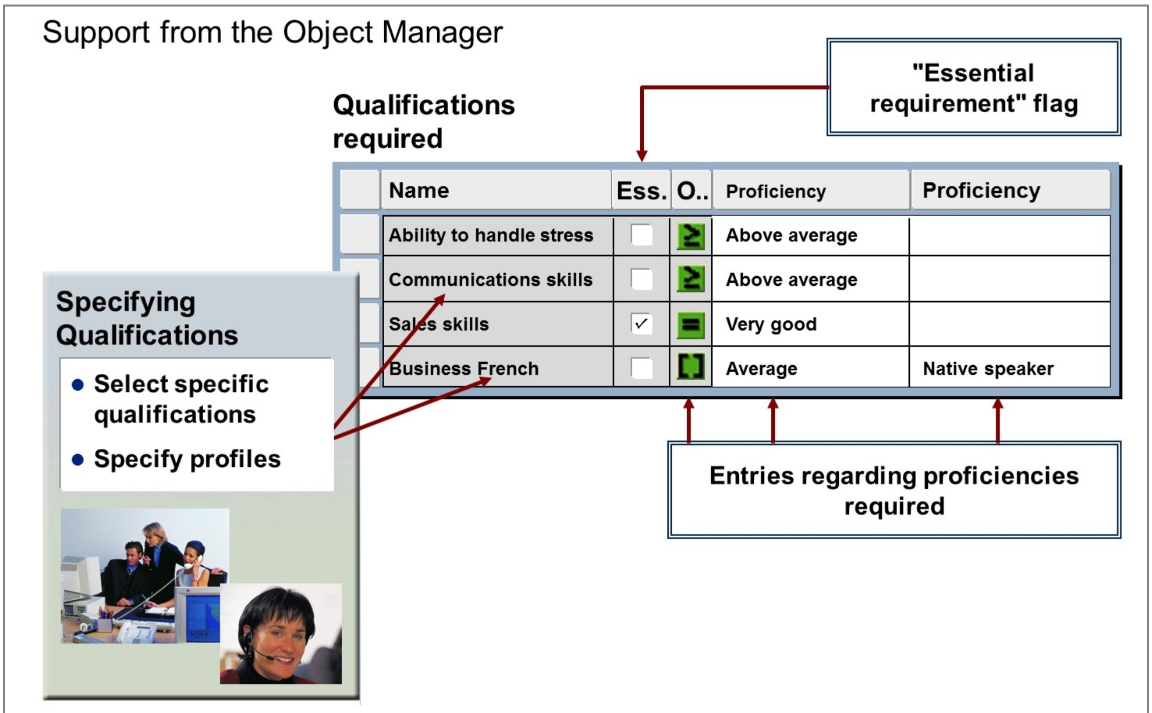


Figure 137: Finding Objects for Qualifications (1)

You can use the Find Objects for qualifications report to search for planning objects(persons, candidates, and so on) that have specific qualifications. You can also specify that each individual qualification requires a specific level of proficiency and restrict your selection further by entering additional selection criteria.

Examples of reports to find objects with qualifications include the following:

- Finding persons (or candidates) with specific qualifications.
- Searching within an organizational unit to find suitable people to work on a project team.
- Identify employees who exceed or fall short of the specified qualification criteria.

When you specify the qualifications for which you are trying to find objects, you can select qualifications individually from the qualifications catalog. When you specify the proficiency you are looking for, you can enter individual values or value ranges, and you can also specify that objects must meet certain conditions.

By setting the Essential Requirement flag for a qualification, you can specify that the object you are looking for must have the qualification in question.

Hint:
This function is also used in the Recruitment process.

Finding Objects for Qualifications II

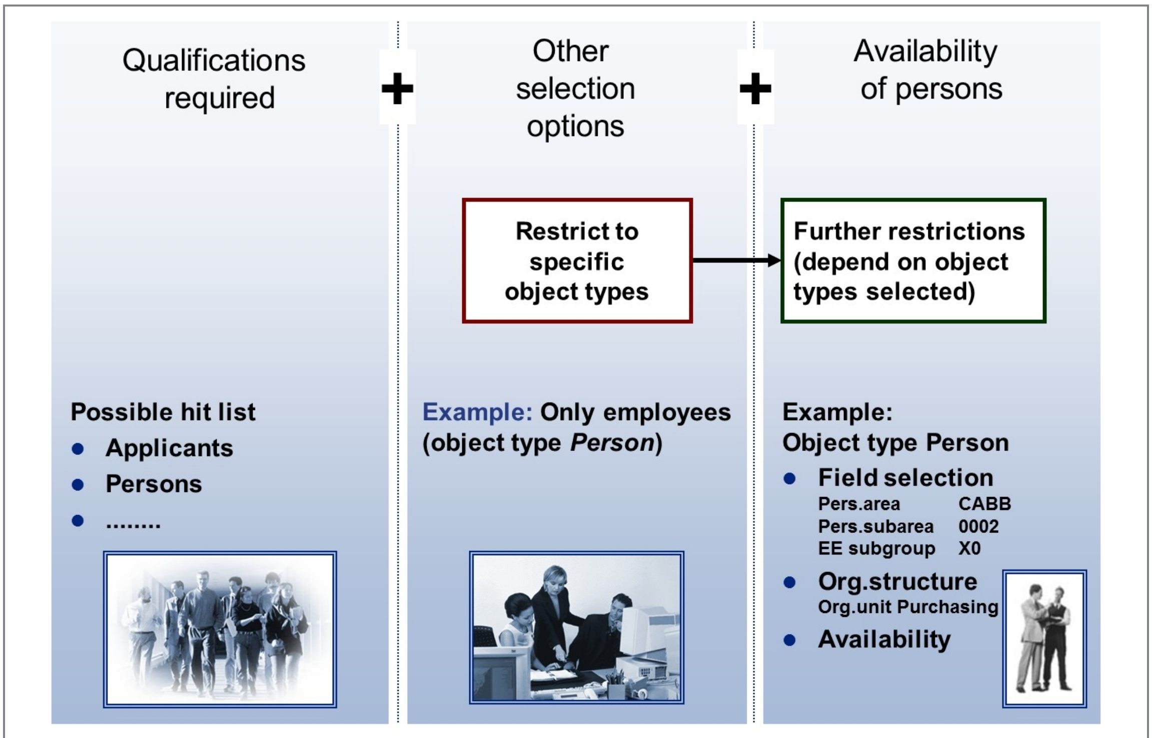


Figure 138: Finding Objects for Qualifications (2)

You can limit your search to objects of specific object types. For example, you might wish to restrict your search to employees (object type P), or to applicants (object type AP).

Depending on the object types you specify, you can further limit your search. For example, you might limit your search to objects of the object type Person, and then specify that the persons must belong to particular organizational units. You may also further restrict the selection to specific personnel areas, employee subgroups, and so on.

The report generates a list that contains objects that have the specified qualifications and proficiency and fulfill the other selection criteria. Alternative qualifications are displayed if specified in the user-specific settings. The list is output in the SAP List Viewer.

You can specify the availability of a person (object type P) as an additional selection criterion. This system verifies this via the interface with Time Management.

Planning for Organizational Unit

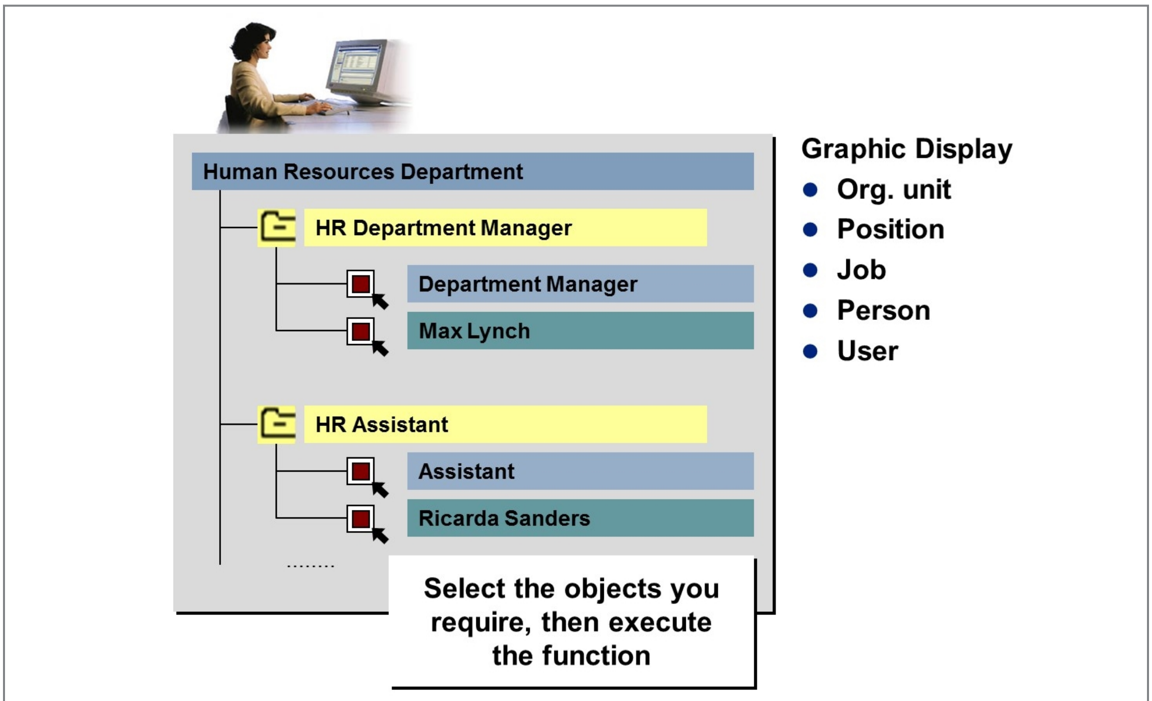


Figure 139: Planning for Organizational Units

Planning for an Organizational Unit allows you to restrict your view to an organizational unit. You can perform all the change, display, and reporting functions of Personnel Development directly from the structure display by selecting the objects you require, and executing the function.

LESSON SUMMARY

You should now be able to:

- Execute a profile match-up

Unit 7

Learning Assessment

1. Qualifications and requirements originate from the qualifications catalog.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. Qualifications and requirements originate from the qualifications catalog.

   Determine whether this statement is true or false.

   [X] True

   [ ] False

   Correct. They are of the same object type. If qualifications are stored for persons/ candidates, they are referred to as qualifications. If they are stored for jobs/positions, they are referred to as requirements.

UNIT 8 SAP Learning and Development

UNIT OBJECTIVES

- Create a training event in the Training and Event catalog
- Enroll an employee in a training event
- Evaluate the components of the enterprise blended learning solution
- Create and assign employee development plans

Unit 8
Lesson 1

Maintaining Training Events

LESSON OVERVIEW

This lesson show you how to set up the Training and Event Management catalog and enroll an employee in a training event.

Business Example

As the Training Specialist, you are responsible for managing the Training and Event catalog, including the creation of events and enrolling employees. For this reason, you require the following knowledge:

- A good understanding of the training events required
- A good understanding of the enrolment process

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a training event in the Training and Event catalog

Training and Event Management

Training and Event Management gives you the ability to ensure you have the required skills within your organization by offering a comprehensive training catalog of training events. Training events are maintained in a catalog consisting of business event groups and event types which form the framework of your catalog.

Processes in Training and Event Management

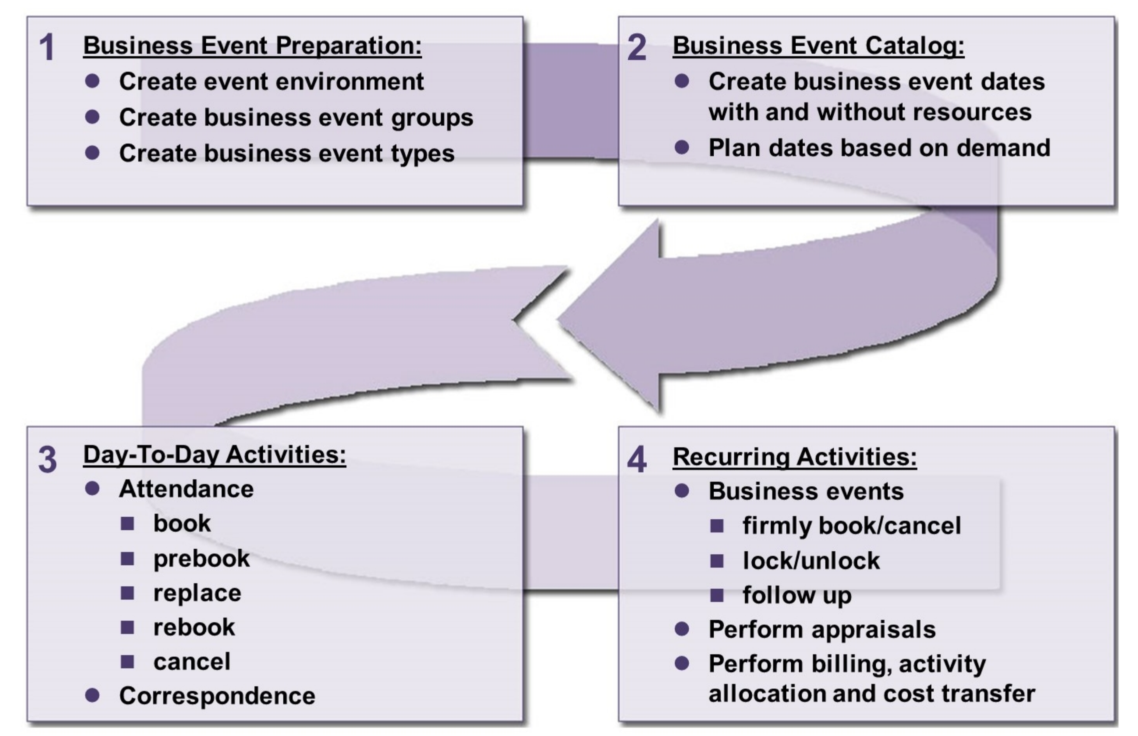


Figure 140: Processes in Training and Event Management

Training and Event Management includes the following main processes:

1. Business Event Preparation: This phase comprises the creation and maintenance of the master data accessed when you create your business event catalog including, for example, time schedules, event locations, and resources.
2. Business Event Catalog: You can create individual or multiple event dates, with or without resources (for example an instructor). This can be done manually or based on existing demand for the event.
3. Day-to-Day Activities: These activities are carried out for the created events, for example:
   - book (register to attend) internal and external attendees
   - prebook attendance
   - replace bookings
   - rebook
   - cancel attendance
   - create correspondence (provides notification for activities)
4. Recurring Activities: These are periodic activities, for example:
   - firmly booking events
   - locking events

- unlocking events
- canceling events
- follow-up activities

Each of the processes has appropriate reports available.

Dynamic Menus

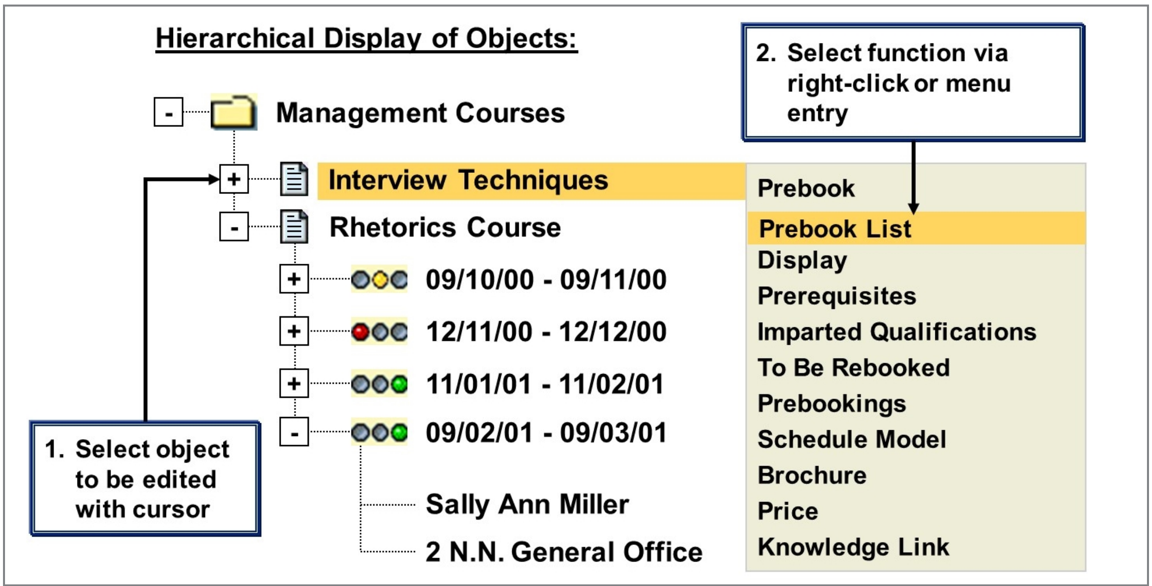


Figure 141: Working in the Dynamic Menus

Training and Event Management has dynamic menus that simplify operation of the system by offering a way to create and maintain Training and Event Management objects. The advantage of dynamic menus is that you create data and access functions directly in the clearly structured environment of the business event hierarchy.

The dynamic menus include the following:

- Master data
- Attendance
- Business Event
- Information
- Planning
- Resource
- Tools

When you select an object, the system automatically reads the current object data so that you do not have to enter it yourself. You access the various functions either via the menu or by clicking the right mouse button beside the appropriate object. Filters and selection criteria options control the data displayed in a dynamic menu. For example, you can set the status criterion to display only events in planned status.

Selecting an extended search allows you to search for any object that exists in the dynamic menu structure, such as an attendee. When the system finds the object, the structure of the corresponding root object is opened to the object.

The Goto option allows you to navigate to the attendance, the information, and the business event menu as required. You always access the same level of the structure as the one you leave. Data is immediately updated in each of the menus so that once you have created data in one menu, you can seamlessly proceed to edit it in the next menu without having to exit and refresh your work area.

Business Event Preparation: Master Data

Figure 142: Business Event Preparation: Master Data

The business event environment contains the basic data required for business events such as time schedules, building addresses, cost items, event locations, organizers, resources, and resource types.

You create this master data during the business event preparation phase. You access it later when you create the business event catalog.

Business Event Preparation: Hierarchy

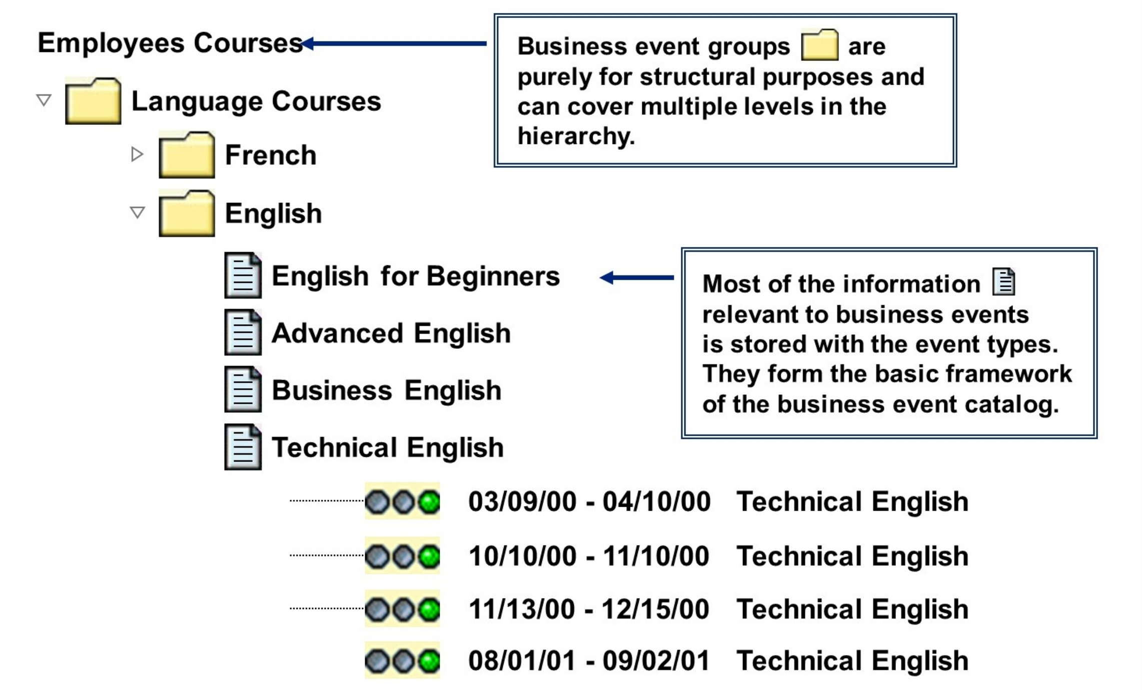


Figure 143: Business Event Preparation: Business Event Hierarchy

The business event catalog is presented in a hierarchical form. It is made up of business event groups and event types.

The hierarchies of the business event catalog include the following:

Business Event Group:

A business event group is a grouping of business event types that share the same characteristics or deal with related subject matter. Business event groups can, in turn, be combined to form overlying business event groups resulting in a hierarchically structured curriculum or catalog.

Business Event Type:

A business event type is a prototype event including all of the general attributes that apply to events of this type. A business event type is not scheduled to take place on a specific date. Business event types are assigned to event groups. Event groups and types form the basic framework of the business event catalog.

Business Event:

A business event is a specific occurrence of a business event type, scheduled to take place on a specific date. A business event (also referred to as a business event date) inherits all of the attributes stored for the event type, and is scheduled to take place on a specific date. Attendees are booked to business events.

Create and Edit Business Events

> Hint:
> You create business events (dates) in the business event menu.

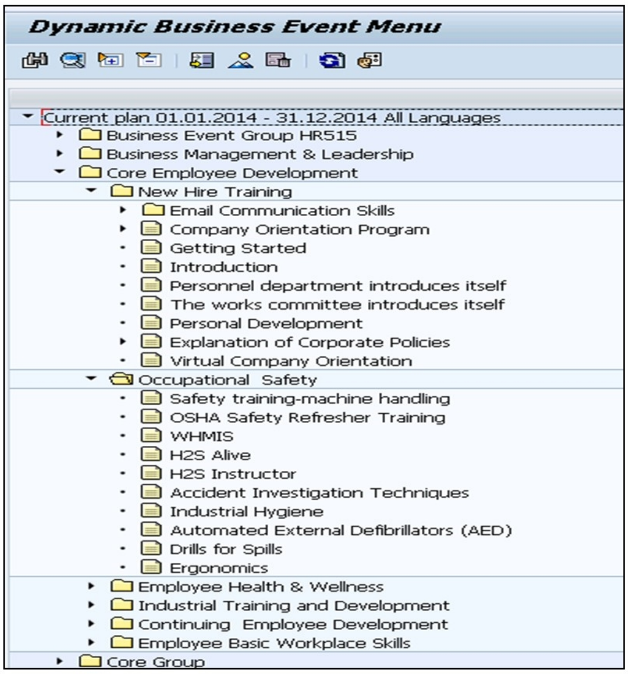


Figure 144: Creating and Editing Business Events: Dynamic Business Event Menu

In the dynamic business event menu, you can execute all of the functions related to creating and editing business events.

Business event functions include:

Function	Purpose
Create Individual Events	- With or without reserving resources (for example instructor, room, material, and so on)
Firmly Book Events	- Put the event in active status
Cancel Events	- Cancel and remove an event from availability
Lock / Unlock Events	- Temporarily close an event from receiving registrations / Re-open an event to allow registrations
Follow-up Activities	- Contact participants, for example
Appraisals	- Create appraisals for completion by participant and / or instructor
Billing	- Invoice external customers and perform activity allocation for internal participants
Cost of Event	- Automatically calculate a price proposal for the event
Display	- Change the displayed objects
Additional Data	- Display additional information such as resource lists, attendee list, or the time schedule for the event

The system reads the relevant data when you place the cursor on an event. To edit an event, position the cursor on it and choose the required function from the menu or right mouse click.

Create Event Dates

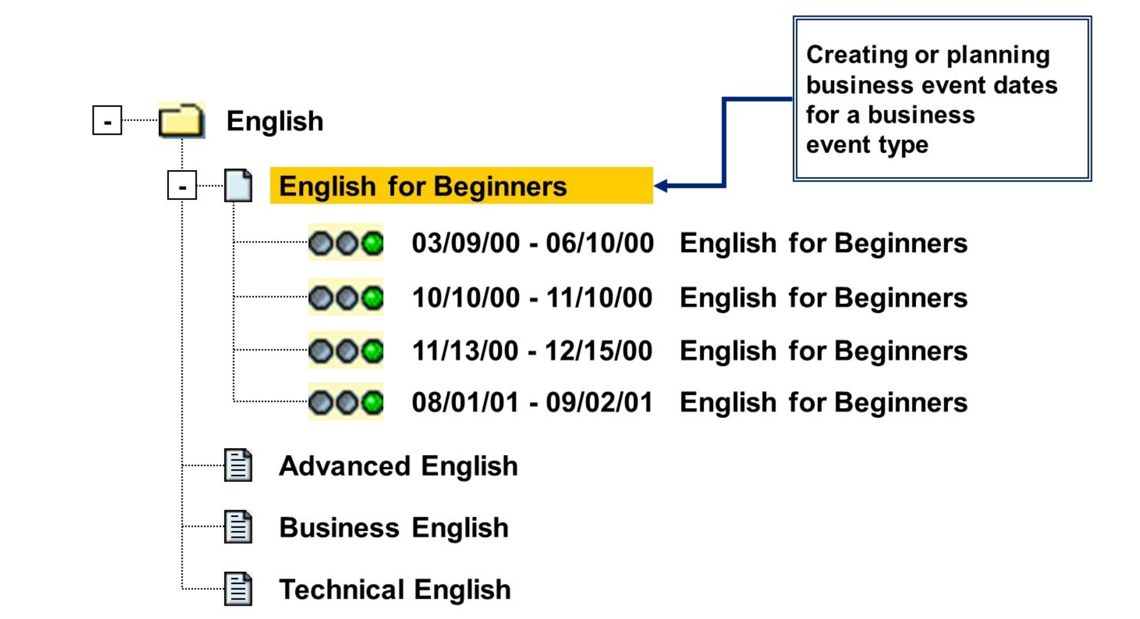


Figure 145: Business Event Catalog: Create Individual Event Dates

You set up a business event catalog by creating or planning business event dates for your business event types. You determine demand and plan events in the dynamic Planning Menu.

Most of the data you store for business event types is proposed as default values for the actual event dates. You can overwrite this data as required. As a general rule, the more data you store for the event type, the less work you have later.

If you transfer the data stored for the event types when you create your business event catalog, only certain fields must be maintained.

Fields to be maintained when data is transferred include the following:

- Date
- Location
- Language
- Resource Reservation (if you select the Create With Resources option)

Business Event Planning

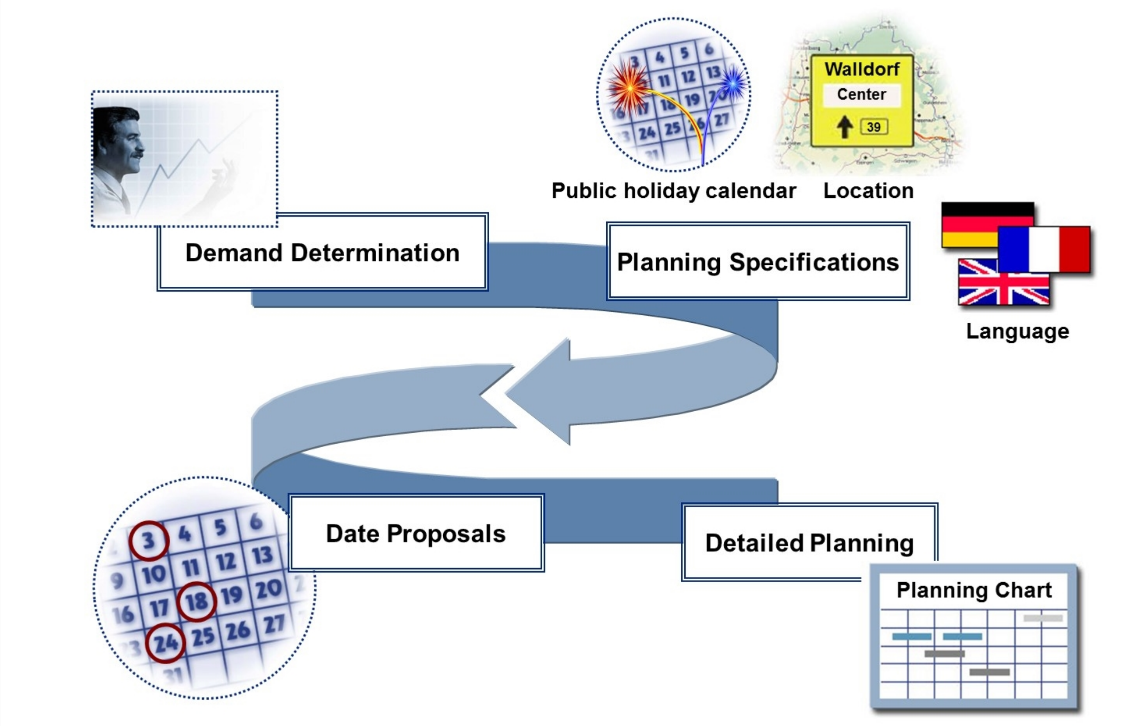


Figure 146: Business Event Planning: Mass Maintenance of Event Dates

The planning function of the dynamic planning menu allows you to plan multiple events in a given time frame and considers various time-related and resource availability conditions.

You plan business events in the dynamic planning menu. You use the Plan function when you want to simultaneously create multiple event dates based on the demand that exists for them.

The planning process contains the following steps:

Specification or determination of business event demand

Demand can be calculated automatically on the basis of the following:

- prebookings received for the event type to date
- the bookings made the previous year
- the demand figures from the previous year's planning.
- manually

Business Event Date Planning

The system determines a number of date proposals for the event you want to plan, taking your calendar and resource specifications into account. The proposed dates are displayed on a planning chart which includes editing options. For example, you can change, move, copy, and delete proposed dates and display the results in list format.

To accept the proposed dates and transfer them to your business event catalog, choose *Save*. If not, choose *Cancel*. You can then modify the specifications and start the planning process again.

Day-to-Day Activities

Figure 147: Day-To-Day Activities: Overview

In the dynamic attendance menu, you can execute booking activity functions.

Example of functions available in the dynamic attendance menu include the following:

- Book attendance
- Prebook attendance (for business event types)
- Replace attendance
- Rebook attendance
- Cancel attendance
- Book attendee lists

Correspondence is automatically output to accompany each of the booking activities ifthe relevant customizing activities are completed. You can monitor the output of correspondence using Correspondence History.

LESSON SUMMARY

You should now be able to:

- Create a training event in the Training and Event catalog

Unit 8
Lesson 2

Enrolling Employees in Training Events

LESSON OVERVIEW

This lesson shows you how to enroll an employee in a training event.

Business Example

As the Benefti Administrator, one of your responsibilities is to manage the benefit programs for your company. In order to manage the benefit programs, you require the following knowledge:

- A good understanding of benefit programs

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Enroll an employee in a training event

Enrollment in Training Events

Training and Event Management

The process of booking attendees into an event includes the following steps:

1. Select the business event (the training course to be attended)
2. Select the attendee to be enrolled in the business event
3. Determine the booking priority to be assigned to the attendee
4. Complete the booking
5. Verify billing information for the attendee to ensure the correct activity allocation

Attendees

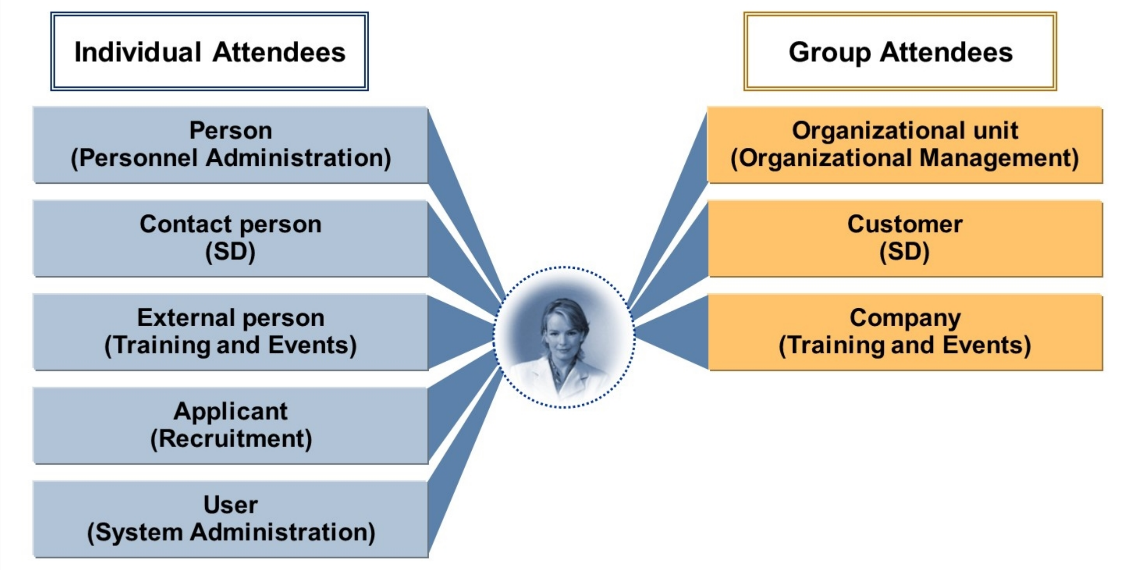


Figure 148: Attendees

To facilitate bookings, individual and group attendees are assigned to attendee types. When you create a new attendee, you select the pertinent attendee type and enter data for the attendee as required. You can make bookings for all attendee types that exist in the system.

Examples of attendee types are as follows:

Object	Object Type	Description
Person	P	Employee of your company
User	US	Person with a record in the user master
External Person	H	Employee from another company
Applicant	AP	External person who has applied for a position
Contact Person	PT	Employee of a partner
Organizational Unit	O	For example, a department in your company
Customer	KU	One of your customers

You can create attendees in the follow ways:

- From the SAP Easy Access screen, choose: *Human Resources → Training and Event Management → Settings → Current Settings → Attendee → Create*
- From the SAP Easy Access screen, choose: *Human Resources → Training and Event Management → Attendance → Attendance Menu. From the dynamic Attendance Menu, choose* Extras->> Attendee ->> Create

- Create an attendee when completing the booking for the event

Booking Priorities

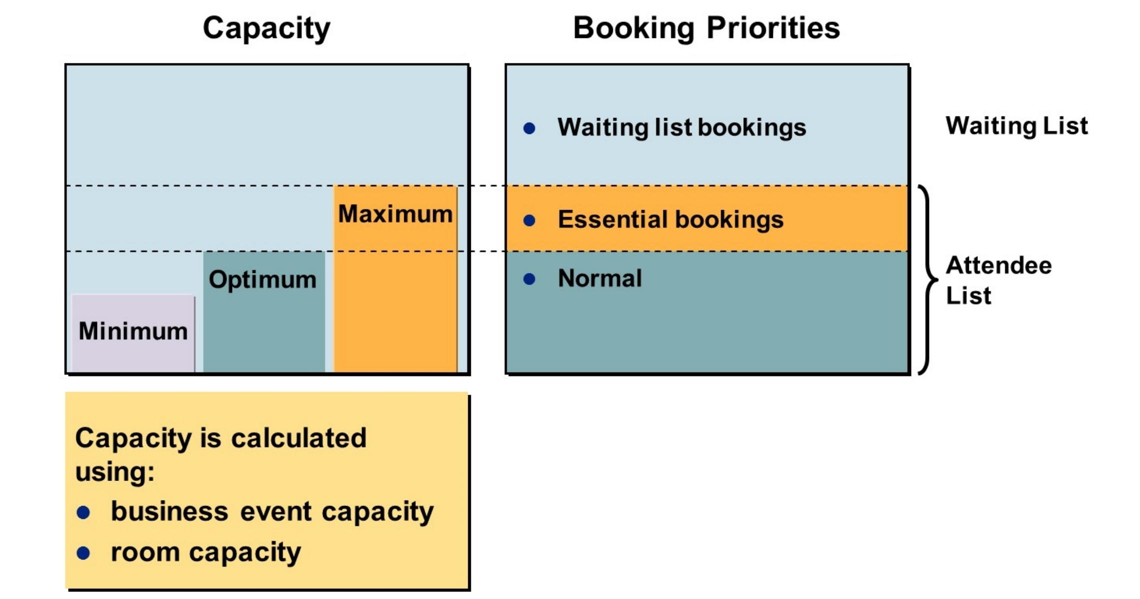


Figure 149: Booking Priorities

The booking priority determines whether an attendee is placed on the attendee list or the waiting list. Booking priorities are indicated by a numeric value. When you book attendance, you can assign the booking a priority or let the system assign it automatically.

The following restrictions apply when booking an attendance:

Normal Booking Priority

- You can assign normal booking priority up to the optimum capacity only.
- Bookings with this priority are assured a place in the event as a rule. They may be moved down to the waiting list when the event is put in firmly booked status.

Essential Booking Priority

- You can assign essential booking priority up to the maximum capacity only.
- Essential bookings will not be moved when the event is firmly booked.

Waiting List

- You assign a waiting list booking when a business event is fully booked.
- You can assign waiting list candidate places on the event if they become available as a result of cancellations.

Correspondence

You can output a variety of notifications to attendees for the activities in Training and Event Management using different media options. With manual output, you also have the option of using Microsoft Word standard letter function and downloading the notification into Microsoft Word.

Automatic correspondence is triggered by specific activities in *Training and Event Management* that you define as correspondence-relevant such as *Book Attendance*.

Correspondence history is included in notification output and provides reporting on documents output to attendees. This report could be used to, for example, indicate when an attendee was sent a confirmation of registration notification. Automatic correspondence functionality includes an error handling workflow which automatically informs training and event administrators if errors occur in the automatic output of correspondence. The administrator receives a message in his or her workflow inbox and can correct the errors and output the corrected notifications manually.

Correspondence includes the following:

- Documents for every activity in Training and Event Management that requires notification
- Output of correspondence
- Numerous templates for notifications:, for example:
  - Confirmation of attendance
  - Provisional confirmation of place
  - Rejection
- Standard letter function
- Download into MS Word (RTF format)
- Output via all standard media (fax, Internet mail, and so on)
- Workflow for errors in automatic correspondence
- Correspondence history

Integration

Figure 150: Integration with Other Application Components

Integration with other application components facilitates direct and efficient data exchange. This data can be further processed in Training and Event Management.

Integration is possible with the following application components:

Cost Accounting:
: Internal activity allocation of attendance fees and instructor costs, cost transfer posting for business event costs.

Sales and Distribution:
: Billing of attendance fees, use of attendee types customer and contact person.

Materials Management:
: Use of materials from the material master as resources for business events, generation of purchase requisitions, and material reservations.

Personnel Development:
: Check for and transfer of qualifications and use of appraisal systems from Personnel Development.

Time Management:
: Recording and checking of attendance (for internal event attendees and instructors).

Organizational Management:
: Use of organizational units as attendees and organizers of business events.

Personnel Administration:
: Use of people from the HR Master Data as attendees and instructors.

Learning Solution:
: Classroom training can be booked online.

Reporting

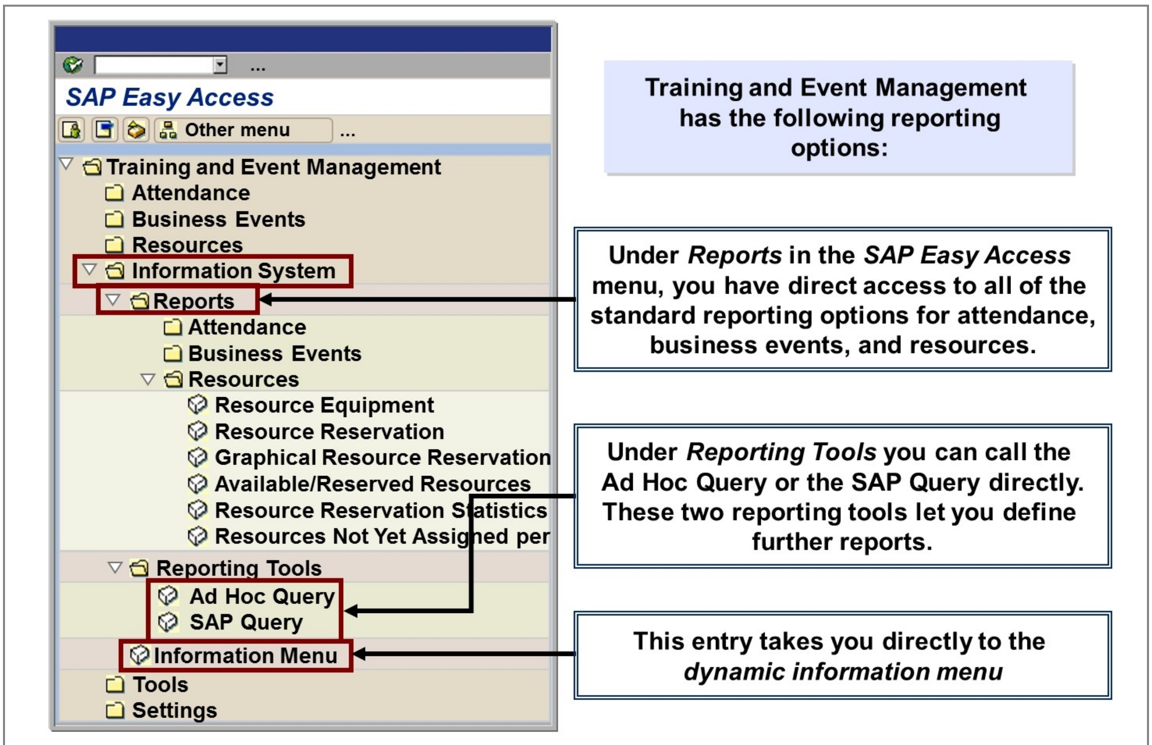


Figure 151: Information System in Training and Events

In the *SAP Easy Access* screen, you can access the reporting options in Training and Event Management by navigating as follows: *Human Resources* → *Training and Event Management* → *Information System*. Various reports for attendances, business events, and resources are listed under *Information Systems* → *Reports*.

Ad Hoc Query allows you to flexibly define reports, all on one screen, without programming. Ad Hoc Query is found under *Information Systems* → *Reports.*

Reports for attendances, business events, and resources are listed under *Information System* → *Dynamic Information.* To generate a report, select the object you want to report on and the report is generated without the need to manually enter data in a selection screen.

In many cases, you can also display and maintain additional data from the report's list screen.

Standard Reports

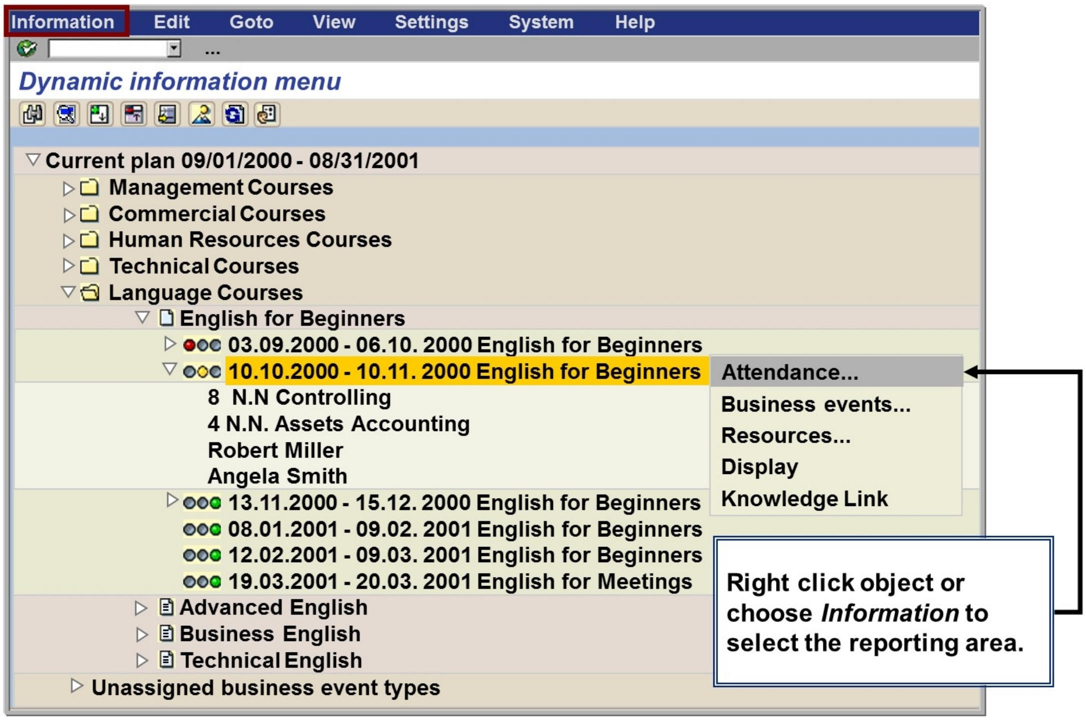


Figure 152: Standard Reports Dynamic Information Menu

In Training and Event Management, there is a dynamic information menu from which you can run all standard reports for attendance, business events, and resources.

The advantage of the dynamic information menu is that the system reads the data for the report automatically when you select an object with the cursor and you do not have to enter the data manually. For example, if you select a business event and start a report, the system automatically reads the business event data.

Hint:
You can switch between the *information menu*, the *attendance menu*, and the *business event* menu as required by choosing *Goto*.

LESSON SUMMARY

You should now be able to:

- Enroll an employee in a training event

Unit 8
Lesson 3

Outlining Enterprise Learning Functionality

LESSON OVERVIEW

This lesson reviews the elements of blended learning using SAP's Enterprise Learning.

Business Example

As a Talent Specialist, you are responsible for the various learning options available to employees. For this reason you require the following knowledge:

- A good understanding of the Learning Management System
- A good understanding of the integration of the Learning Solution

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Evaluate the components of the enterprise blended learning solution

Enterprise Learning

Learning Management System

The Learning Management System (LMS) offers a variety of learning options and functionality to plan, administer, and deliver training in different formats. The LMS also provides analytics to facilitate reporting on delivered trainings and participant performance. Forms of delivery include classroom and via the Internet / intranet and are supported by collaboration tools such as forums and virtual classrooms.

Features of a Learning Management System include the following:

Personalized Learning:

Dynamic, personalized learning which is adaptable to individual needs and learning strategies.

Integration:

Integration with the ERP system avoids double maintenance of data. For example: Linking training requirements to job descriptions are dependent on a seamless integration between ERP and LMS.

Compliance:

Compliance with internationally recognized WBT standards ensures content from a wide range of content providers can be used and content from different platforms can be reused. The main content standards in e-learning are SCORM and AICC.

Authoring Tools:

Authoring tools for creating content and structures

Content:

Reuse of created content

Management of Learning Offerings

Flexible, dynamic management of learning offerings

Blended Learning

Integration of all learning methods

Tracking

Tracking of learning progress

Tests

Placement and final tests

SAP Enterprise Learning: Overview

SAP offers three modules that fulfill the mentioned requirements to different degrees.

SAP Enterprise Learning modules include the following:

Training and Event Management (TEM):

- Supports planning and administration of classroom courses.
- Offers means to maintain a course catalog and administer participation in the different courses.
- Provides an interface for employees to book themselves on courses via Employee Self-Service.
- Reporting functionality.

Learning Solution (LSO): The Learning Solution offers everything that Training and Event Management has, plus the following:

- Multiple delivery methods such as classroom courses, web-based trainings and curricula are supported by the training management system.
- Has a user-friendly web application for learners (Learning Portal) that serves them as a single-point-of-access to all their training activities. From here they can book courses, launch web-based trainings and more.
- Allows for collaboration between learners using the basic collaboration functionality of the SAP NetWeaver Portal. Has an Instructor Portal from which course trainers can manage participation, perform necessary follow-up activities, and run relevant reports.
- Offers tools to create (Authoring Environment) and share (Content Management System) dynamic learning content.
- Reports on learners' progress and performance in web-based trainings and online tests are part of the standard solution.

Enterprise Learning: Enterprise Learning offers everything the Learning Solution has, plus the following:

- built in integration to Virtual learning rooms powered by Adobe Connect which offers the ability to conduct online classroom sessions and meetings in which instructors and learners can participate.

Components of SAP Enterprise Learning

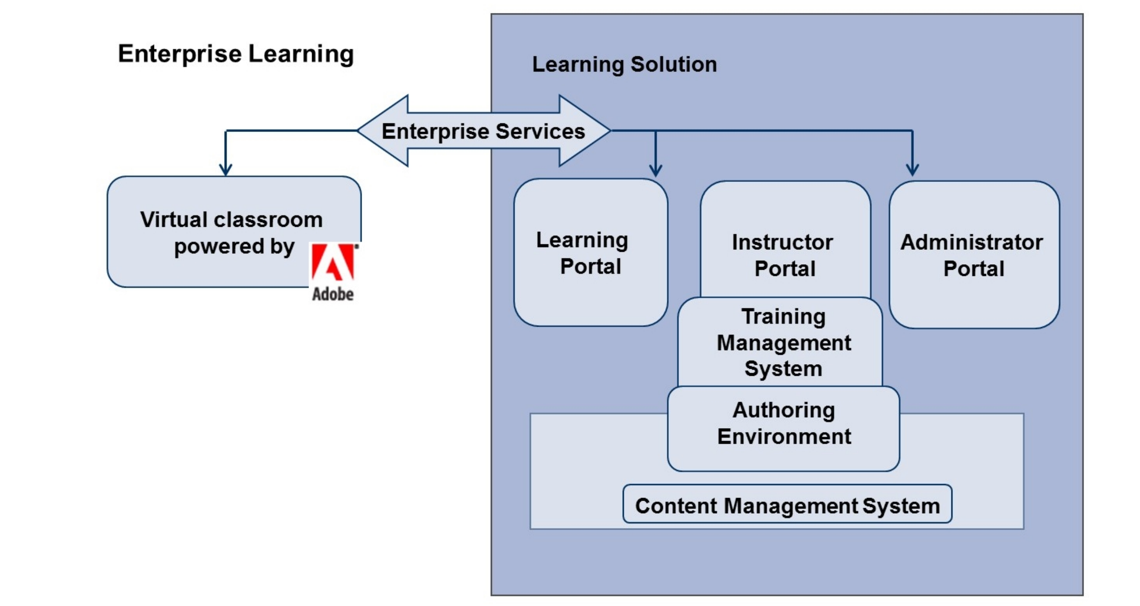


Figure 153: Components of SAP Enterprise Learning

Enterprise Learning was designed following a role-based concept, and offers different functionality for specific target groups.

Target groups of Enterprise Learning include the following:

Learners:

- Log on via a Web browser to their personalized learning portal from their PC at work or at home
- Their learning portal contains details of the complete corporate education and training offerings such as:
  - traditional classroom training
  - e-learning courses (such as virtual classroom sessions or Web-based training or even externally hosted courses)
- Personalized learning proposals are automatically generated based on various criteria such as:
  - the current position or person
  - the organizational unit
  - current or future qualification gaps
  - individual development plans.
- Self-service applications enable learners to:
  - enroll themselves in courses

  - prebook for classroom courses
  - cancel bookings for all delivery methods
  - start self-paced learning units directly
- If learners want to learn offline, they can download the courses onto their PCs or laptops and synchronize their learning progress later.

Course Authors and Instructional Designers:

- Use tools and wizards in the authoring environment to:
  - structure or import external course content
  - create online tests with the test author tool.
- External authoring tools can be launched directly via the authoring environment to create learning content that can be integrated into learning objects and combined to create complete courses (learning nets).
- Attributes can be appended to content, which means that users can structure content more flexibly, depending on the learning strategy they prefer.
- To reuse content as much as possible, the authoring environment enables content authors and instructional designers to attribute metadata to the content. This enhances search results and enables authors to reuse data.

Roles in SAP Enterprise Learning

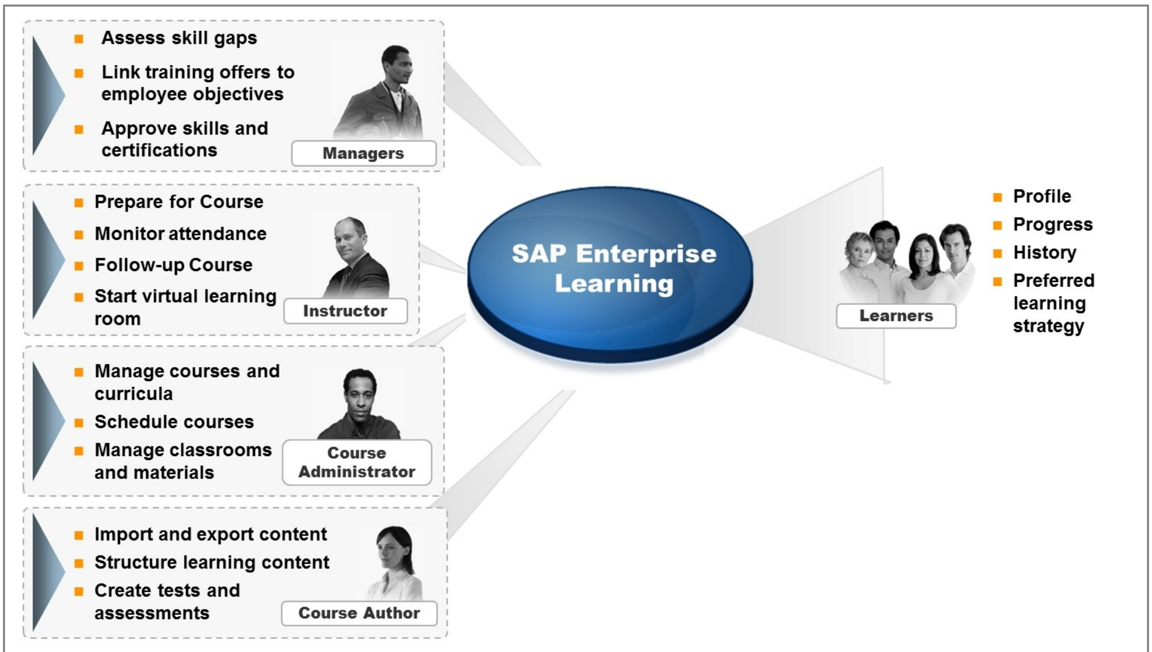


Figure 154: Performers and Functions in SAP Enterprise Learning

Roles in SAP Enterprise Learning include the following:

Training Administrator:

- Create course offerings (based on strategic needs and demand)

- Manage participation, resources, and courses
- Perform reporting in SAP Learning Solution

Supervisors or Managers:

- Monitor and steer the learning processes of their employees
- Can be notified when their employees request participation in or cancellation of courses and can approve or reject these requests
- Reporting functions in training management software enable managers to keep track of employees' learning activities and the associated costs
- Receive extensive support for the planning, organization, and controlling of corporate education and training

Instructors

- Have up-to-the-minute, reliable information about their course schedules
- The Instructor Portal, an instructor-specific user interface, offers functionality that gives instructors better handling of participation management and the follow-up process
- Wide range of reporting options available to keep track of participants, rooms, course locations, and so on

Integration

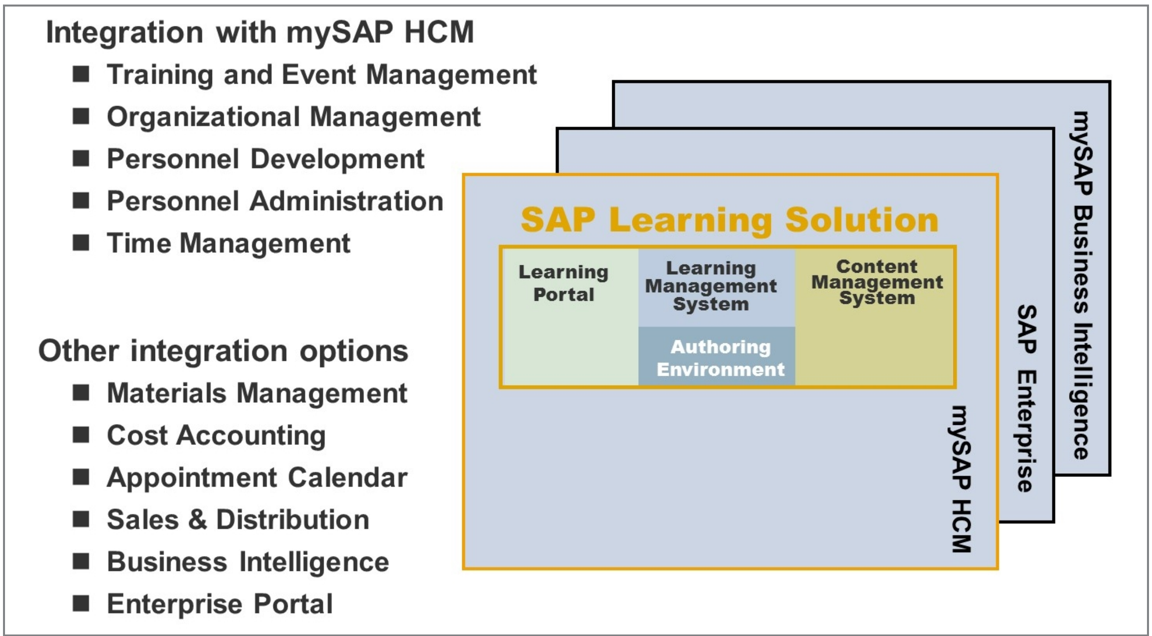


Figure 155: Integration of the Learning Solution

SAP Learning Solution is part of the talent management suite in SAP ERP HCM and integration with other elements of the HCM module is standard. The qualifications catalog, for example, can be used to its full extent.

Examples of integration with the qualifications catalog are as follows:

- Qualifications can be defined and checked as prerequisites for courses.

- Upon successful completion of a course or test, the corresponding qualifications can be updated to the employee's profile.
- Expiration dates of qualifications or certificates are displayed within the learning portal for a defined period before they become effective.
- Course options to renew the qualification or certificate are displayed.
- General functions such as business workflow and reporting are available.
- Courses that are part of the individual development plan of a learner, are automatically displayed as a personalized learning proposal in the learning portal.
- Data from Organizational Management can be used to guide the personnel development process or to target trainings by assigning courses to entire organizational units.
- Time Management integration supports the administrative process by checking the availability of the participant during the booking process and ensuring that course bookings result in a reservation of a time slot.

Additional integration options include the following:

Materials Management:

- Classroom training requires materials such as training manuals, stationery, and so on. The materials required can be procured or ordered directly from Materials Management if the component is integrated.
- To utilize this integration, you must implement the relevant Materials Management sub-component of the SAP ERP 6.0 Supply Chain Management solution.

Cost Accounting:

- While external participants are billed for course participation, training costs for internal employees are settled by means of internal activity allocation. During this process the employee's cost center is debited with the costs.
- Participation fees may also be posted to internal orders.
- To utilize the integration, you must implement the relevant sub-component of the SAP ERP 6.0 Financials solution.

SAP Appointment Calendar:

- An employee's bookings can be automatically entered in the SAP Appointment Calendar. Course dates are entered and displayed as appointments.
- The SAP Appointment Calendar can be synchronized with other calendars, such as Outlook. In this case, course dates are also entered in the employee's Outlook calendar

Sales and Distribution:

- In addition to managing data about employees, data on external participants can also be managed. Customer data from Sales and Distribution is used for this purpose.
- This data is used for billing purposes and to determine participants' addresses.
- To utilize this integration, you must implement the relevant sub-component of the SAP ERP 6.0 Customer Relationship Management solution.

SAP ERP 6.0 Business Intelligence:

- Offers enhanced reporting capabilities

The different Web interfaces seamlessly integrate with the SAP ERP 6.0 SAP Enterprise Portal.

The Learning Portal

The learning portal is the employee's personalized point of access to all learning-related functions. SAP Learning Solution provides a variety of portal design options enabling you to create the learning portal that best suits the needs of your employees and your organization.

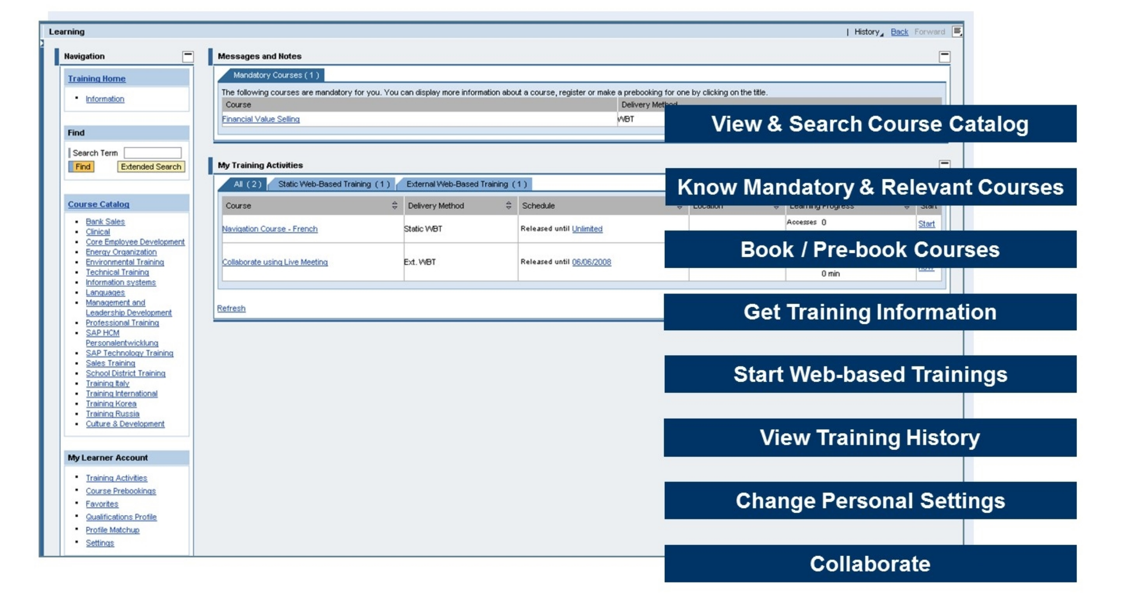


Figure 156: Functions of the Learning Portal

The learning portal gives learners access to the following functions:

Search for Courses:

- The Find function enables users to find courses in the course catalog that have keywords in the course title or description.
- The Extended Search function allows learners to search the attributes appended to courses, such as target group, prerequisites, qualifications imparted, or delivery method.

Mandatory and Relevant Courses:

- Courses which were set as mandatory for the learner are displayed in the Messages and Notes section.
- Complete a profile match-up which compares the required qualifications of the learner's position with those the learner currently possesses. The system will display a list of the courses that impart missing or deficient qualifications.

Obtain Training Information:

- Each course has its own page where information such as course description, schedule, location, instructors, and so on, is displayed. Once a learner is booked in a course, other participants are also displayed.

Book / Prebook Courses:

- Once the learner has viewed the required information on courses of interest, he or she can directly register for the course. A confirmation prompt is displayed before the booking is made. Upon confirmation, the learner is immediately booked for classroom training or can launch a Web-based course.
- Predefined workflow approval processes can route an enrollment request to a supervisor before the actual booking is made.
- If the scheduled course times & locations are not suitable, the learner she can create a prebooking for the course. When a new course of that type is scheduled in the future, the learner is informed about it in the Messages and Notes section in the Learning Portal. This message remains until the learner has booked the course or cancels the prebooking.
- Courses that a learner is booked in can also be canceled from the portal.

Start Web-based Training:

- The learner can launch a web-based or online course as soon as it has been booked.
- The learner can also resume the course at any time from the current courses overview. When the learner resumes an interrupted course, the course opens at exactly the point at which it was interrupted.
- Information about learning progress is accessible to the learner at any time.

View Training History:

- The learner account displays all of the learner's training activities, including completed and canceled courses. Learning management software provides information about the learner's overall course progress. This information is updated dynamically as the learner progresses through a course.

Change Personal Settings:

- In Settings, learners can set items such as their Preferred Learning Strategy, Catalog View settings, or Search options. The learning strategy concept, which is based on personal learning patterns or style, recognizes that people learn in different ways. When the learner starts a self-paced course, the learning strategy specified determines how the learning material is structured and in what sequence it is presented.

Collaborate:

- The training administrator can select and assign existing collaboration rooms to a course. Learners can use collaboration technologies like chats, team calendars, and forums, depending on the assigned collaboration room.
- Virtual classroom sessions can be started, using Adobe Connect technology to interact with other participants and the instructor via voice, chat and other engaging ways while sharing documents and more.

Virtual Learning Rooms

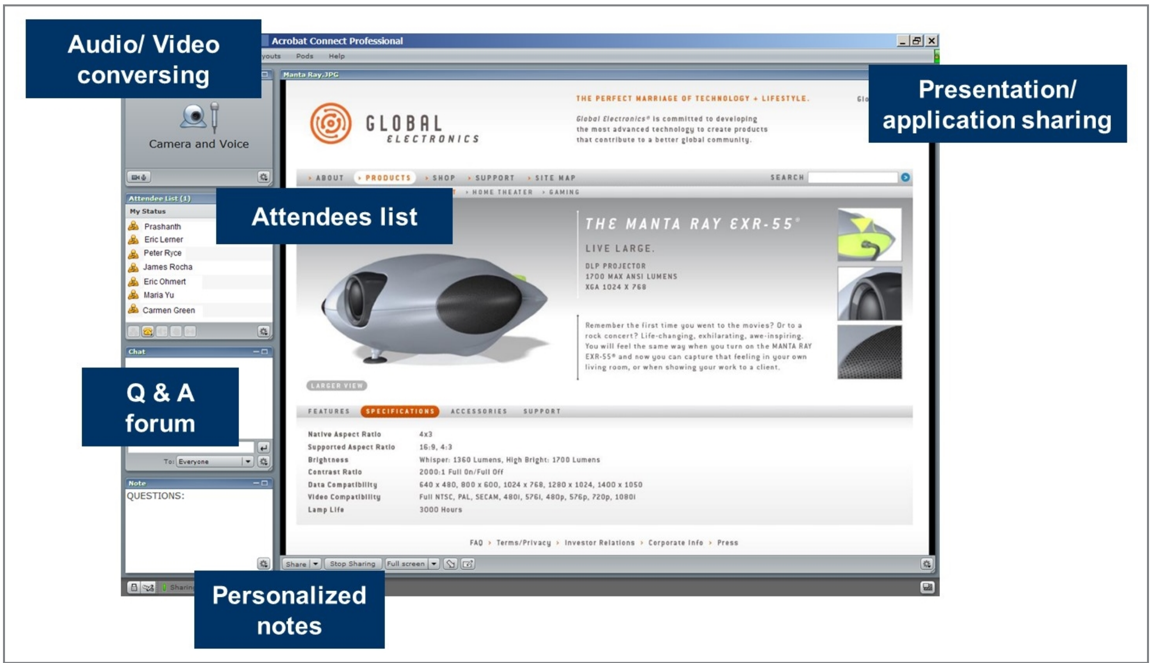


Figure 157: Virtual Learning Rooms Leveraging Adobe Connect Technology

The Instructor Portal

The Learning Solution offers instructors their own user interface which supports their activities before and after course delivery. The course work list offers a personalized view of the instructor's own courses. Instructors can manage participation to their courses, and can also follow-up such courses later, confirming participation and assessing participants' performance. Virtual learning rooms can be assigned to courses and accessed by the instructor via the Instructor Portal.

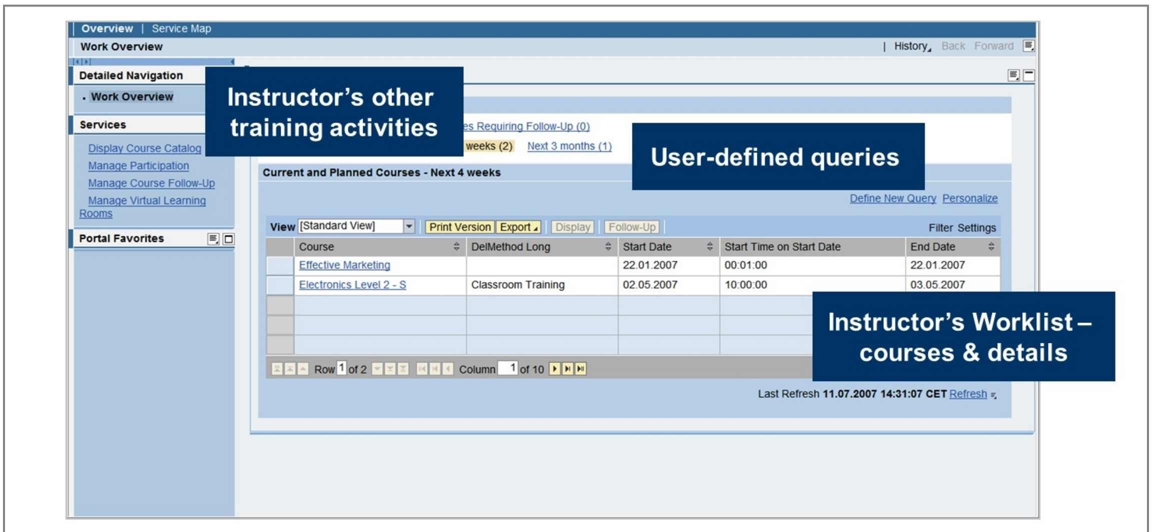


Figure 158: Functionality of the Instructor Portal

The Authoring Environment

The authoring environment is an integral part of SAP Learning Solution. It has powerful tools for creating, structuring, and publishing course content and tests that facilitate and optimize the work of instructional designers, subject matter experts, and training administrators.

The authoring environment contains the following tools:

Instructional Design Editor:

- Used by instructional designers and subject matter experts to create and structure learning content (learning nets and learning objects)

Test Author:

- Used by instructional designers and subject matter experts to create Web-based tests

Repository Explorer:

- Used by training administrators and instructional designers to manage content

Instructional Design Editor

The Instructional Design Editor integrates with corresponding tools and, when working with content, is the center piece of the Authoring Environment.

> Hint:
> A valuable tool to create SAP E-Learning is SAP Workforce Performance Builder (WPB).

Content conversion, import, and export functions enable easy integration of Shareable Content Object Reference Model (SCORM)-compliant courses from external providers. You can create and save your own templates for the various learning elements (learning objects, tests, and so on) that define structural and content-related specifications.

LESSON SUMMARY

You should now be able to:

- Evaluate the components of the enterprise blended learning solution

Unit 8
Lesson 4

Creating Development Plans

LESSON OVERVIEW

This lesson shows you how to create and assign general development plans.

Business Example

As the Personnel Development Specialist, you are responsible for the maintenance of general development plans and the creation of personal development plans for employees. For this reason, you require the following knowledge:

- A good understanding of the development planning process
- A good understanding of the development plan catalog

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create and assign employee development plans

Development Plans

Development plans play a central role in the personnel planning process. A development plan includes a sequence of development measures to be completed by employees. You can use development plans to map both generally applicable and individual development plans. A generally applicable plan can apply, for example, to all employees in a specific organizational unit. Individual development items are added for individual employees to personalize the general plan to the specific needs of the employee. You can then use these development plans to manage both short-term and long-term development (training) measures for employees.

Examples of development measures could include the following:

- Attend a specific business event
- Practical working experience in a specific organizational unit
- Working experience in a specific position for a minimum period of time

Development measures can run in parallel to each other.

Figure 159: Development Plans

Development plans play a central role in the personnel planning process.

Development plan can be used to map various development measures within your organization.

Examples of development measures you can track are as follows:

- Trainee Programs
- Training courses, seminars, workshops
- On-the-job training
- Job Rotation

If you use the Training and Event Management functionality, the system automatically records the details of the courses an employee attends to the individual development plan.

Types of Development Plans

Figure 160: General and Individual Development Plans

Types of development plans include the following:

General Development Plan:

A general development plan is a collection of training measures that impart specific qualifications for a specific purpose.

You can use general development plans as generally applicable, non-person specific templates. These templates are used to create training and further education measures. You can copy a general development plan to the individual development plans of specific employees, and change them to suit the requirements of the individual. For example, you can create an entire trainee program as a general development plan and copy it to the individual development plans of the employees who are to participate in the trainee program.

Individual Development Plan:

You use an individual development plan to manage the training and development of a specific employee. The individual development plan is tailored to the needs of the employee by adding the necessary items or development plans. For example, you can include individual measures, entire training programs, or even a catalog of development measures for planning the career of a potential manager.

Development Plan Items

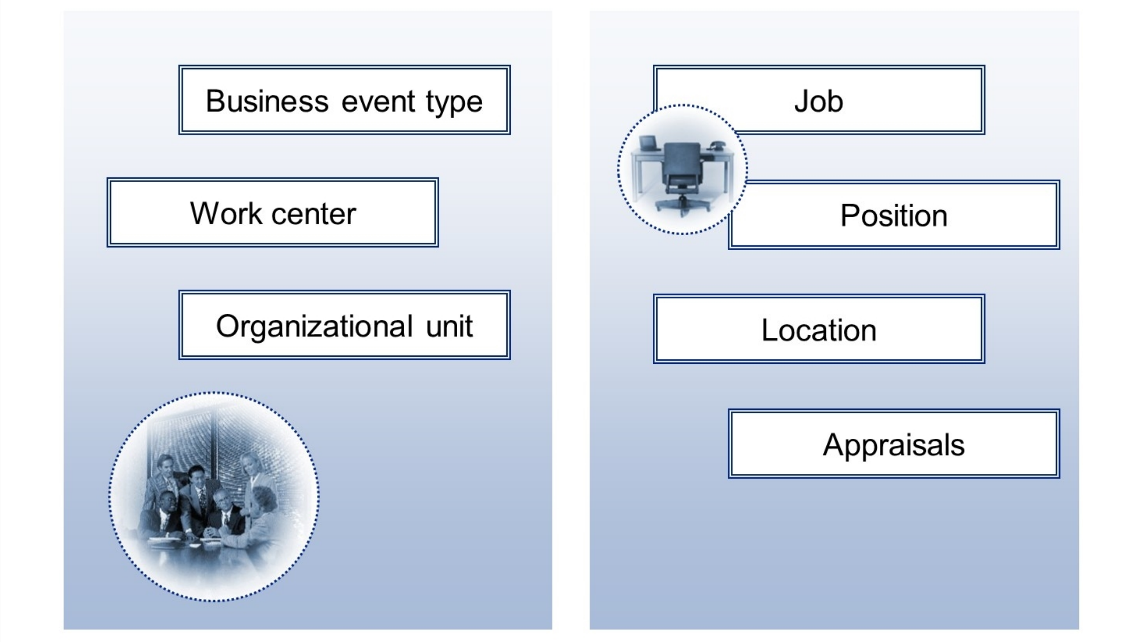


Figure 161: Possible Development Plan Items

You can create and manage development plans in the development plan catalog. You can then use these general development plans as templates for creating individual development plans. Each development plan contains a sequence of development measures (items) and information on their duration, sequence, and so on.

Examples of individual development measures (items):

- Attendance of a training course
- Staffing of a position
- Practical experience in a specific organizational unit
- Time spent abroad

Development Plan Catalog

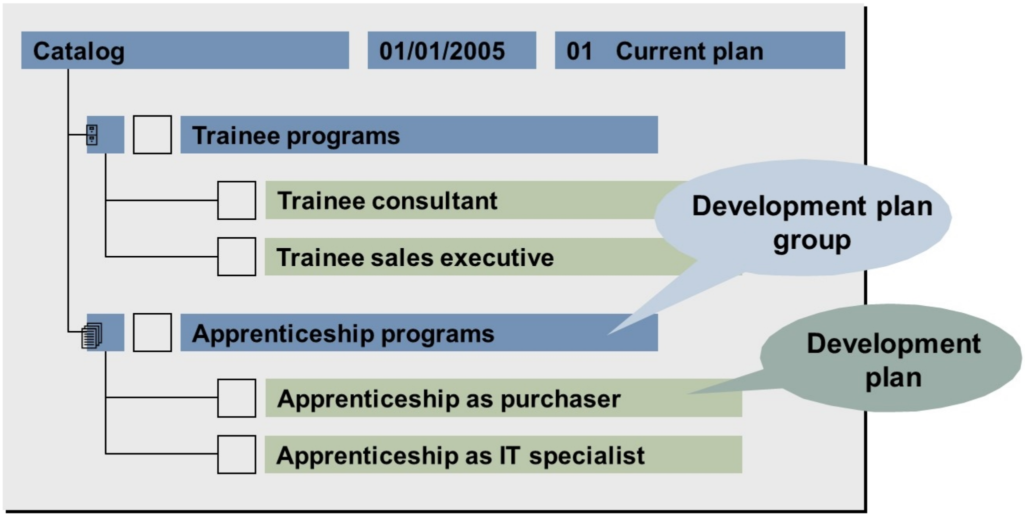


Figure 162: Development Plan Catalog

You can use development plan groups to help structure the catalog. A development plan group is a collection of development plans that share the same characteristics.

A development plan catalog can contain both development plan groups and development plans.

A development plan catalog consists of the following objects:

Development Plan Groups (object type BL):

- are used to structure the content of the development plan catalog
- can contain development plans, and also further development plan groups
- descriptive texts can be entered

Development Plan (Object type B):

- contains a sequence of items such as:
  - attendance of a business event (for example, a communications course)
  - staffing of a position (for example, sales assistant)
  - practical experience in an organizational unit (for example, the sales department)
- descriptive texts can be entered

A translation function is also available which means that you can use the development plan catalog in different languages. The development plan catalog is edited in customizing under Personnel Development or in a live system under Current Settings.

General Development Plans

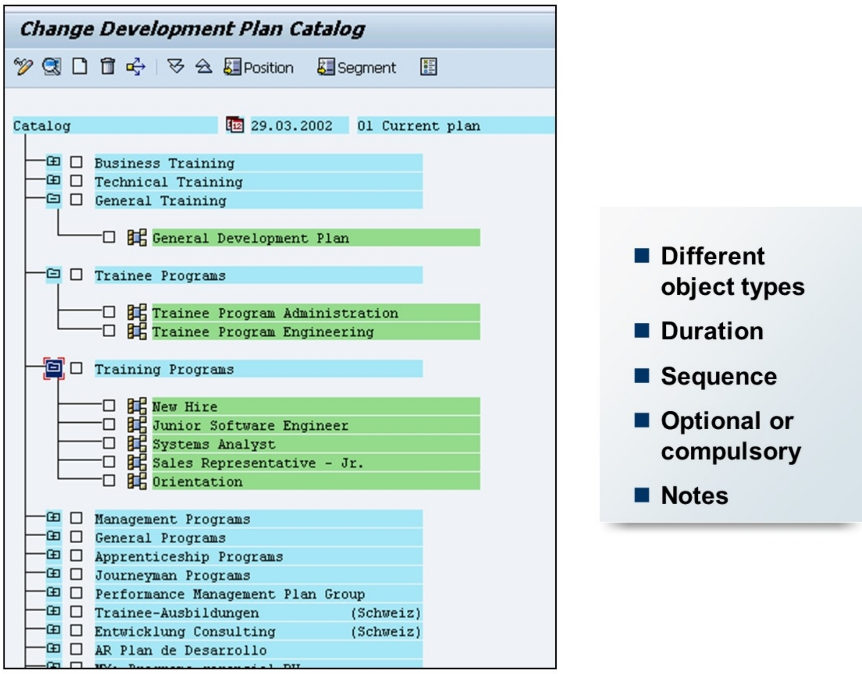


Figure 163: Structure of General Development Plans

Development plans contain a sequence of development plan items.

Note:
The user parameter setting HRPDV_DEVPLAN if set to A will return the ABAP List view and if set to G will return a graphical display.

You can store the following information for each item:

- Duration in years, months, days
- Whether it is an optional or required item

Within one step you can specify the number of required items, for example, that the employee must pass through at least one of three items.

Hint:
If you include a business event type in a development plan, and a duration has been specified for this business event type in the Training and Event Management component, this duration is also used for the corresponding item in the development plan.

Individual Development Plans

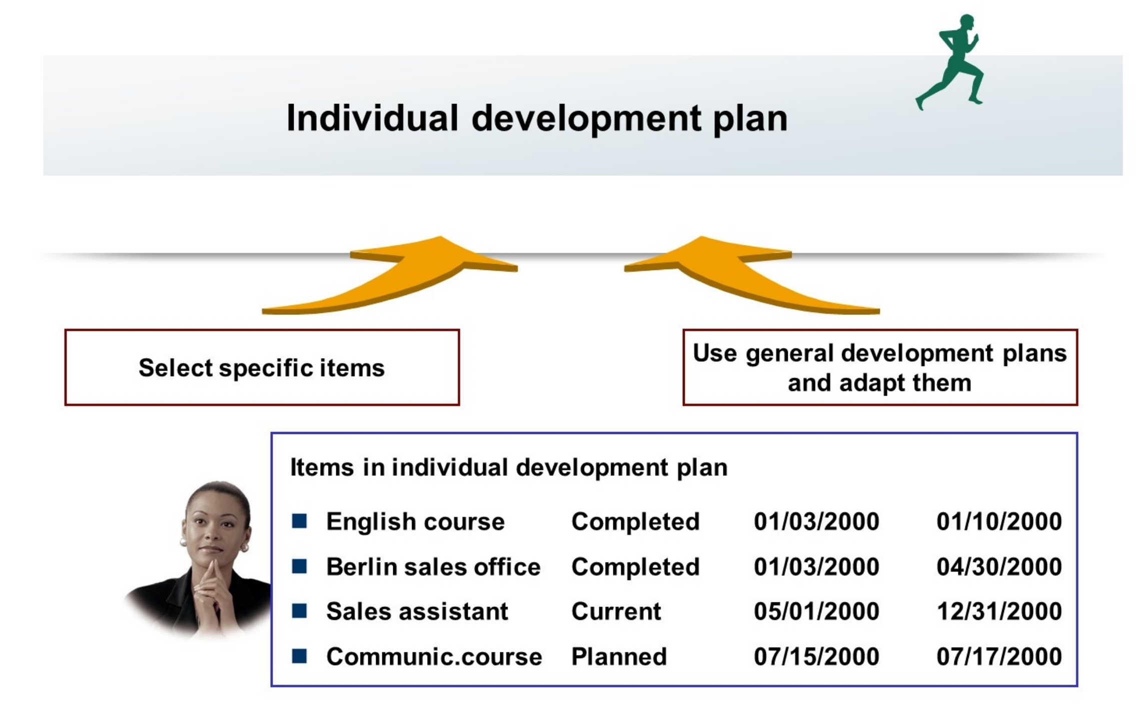


Figure 164: Individual Development Plans

You can use individual development plans as a means of planning and controlling the professional development of individual employees.

You can use general development plans to supplement and complement individual plans to depict the current requirements of the employees. The individual development plan is a general development plan modified to suit the needs of an individual employee.

You create an individual development plan for one person. This plan is then constantly updated. An individual development plan contains all planned, current, and completed items pertaining to a person.

You can also add appraisal models as development plan items.

In an individual development plan, every item and general development plan is assigned a validity period and a status (for example, Planned, Current, Completed). This status is used to regulate the progress of the measure in question. This means you can document an employee's personnel development history to date in an individual development plan. Note that a status is not assigned to the individual development plan itself (as a whole).

If configured to do so, the system can write the items in a development plan to subprofiles as qualifications for the individual persons.

Development plan history may be used to:

- Obtain an overview of the development plans in which a person is currently participating/has participated
- Delete development plans from the person's history
- Tailor a development plan to a person's needs, and change the state of a development plan

Automatic State Management

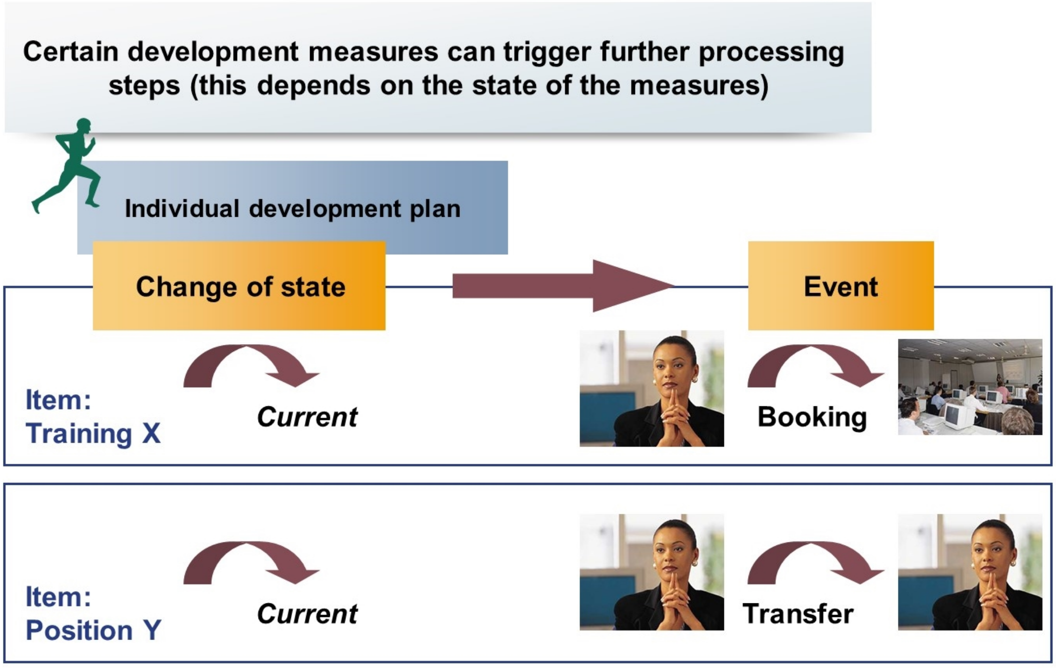


Figure 165: Automatic State Management (1)

If you assign a specific state to a development plan or to an item in a development plan, you can trigger the system to perform certain further processing steps automatically.

You can update the states (Planned, Current, and so on) of items in individual development plans manually. It is, however, possible to partially automate state management for items. You can specify that certain events should automatically trigger a change in the state of specific items.

The standard system contains the following function modules for further processing:

- If an item involves attending a business event, and its status is changed to Current, the person is booked into the business event in question.
- If an item involves staffing a particular position, and its status is changed to Current, the person is transferred to the position in question.
- If the status Completed successfully is assigned to a development plan (within an individual development plan), the qualifications imparted by the development plan are written to the person's qualifications profile.
- If the status Current is assigned to an appraisal, the system goes directly to the functionality for holding the appraisal.

Customizing settings control whether or not users have to confirm execution of a further processing module or whether the system should execute it entirely in the background.

The events are not bound by the validity period (the duration defined for an item in an individual development plan). The system triggers events when a specific action occurs (for example, a person is transferred to a position). This changes the state of the item in question, even if the event occurs before the end of the validity period defined for the item.

LESSON SUMMARY

You should now be able to:

- Create and assign employee development plans

Unit 8

Learning Assessment

1. The dynamic menus in Training and Event Management allow you to branch directly from the objects in the business event hierarchy to the individual functions.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. The dynamic menus in Training and Event Management allow you to branch directly from the objects in the business event hierarchy to the individual functions.

   Determine whether this statement is true or false.

   - [X] True
   - [ ] False

   Correct. Notice that the function selection of the right mouse button changes, or the functions in the menu change depending on the particular dynamic menu (for example, attendance menu or business event menu).

UNIT 9 Performance and Talent Management

UNIT OBJECTIVES

- Create a performance review
- Plan the deployment of internal talent

Unit 9
Lesson 1

Creating Performance Review Documents

LESSON OVERVIEW

This lesson shows you how to create a performance review document and manage internal talent.

Business Example

As the Performance Management Specialist, you are responsible for the set-up and maintenance of the performance review process for employees. For this reason, you require the following knowledge:

- A good understanding of the performance management process
- A good understanding of employee appraisals
- A basic understanding of talent management

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Create a performance review

Performance Management

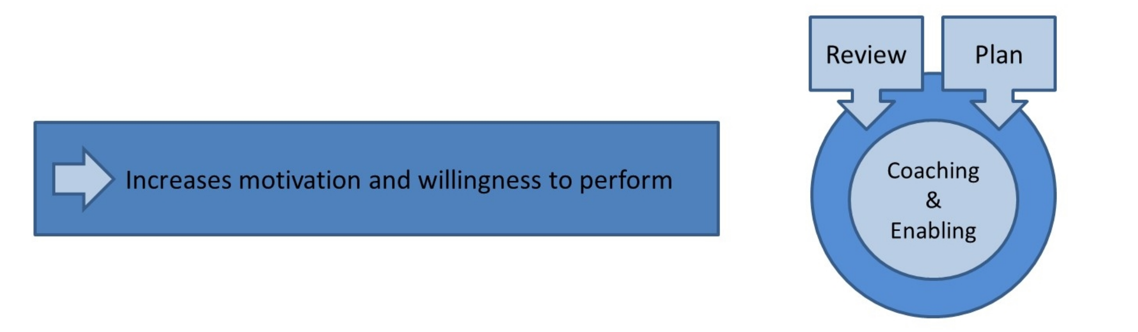


Figure 166: Performance Management

Performance Management is used to manage employee performance in a consistent manner. Compensation is based on the extent to which the employee fulfills the goals set. This method of management frequently leads to increased motivation and improved performance on the part of employees.

SAP ERP 6.0 HCM Performance Management enables you to track your employees' operational objectives. Performance Management enables you to pass corporate goals and strategies down to the employee level.

Performance management is a process that integrates the goals of your organization with measurable employee objectives, appraisals, feedback, and compensation administration.

Components of performance management include the following:

- Creation of Cascading goals and values throughout the organization
- Continuous feedback process; planning, review, appraisal

Performance management is integrated with the following SAP ERP components:

- Between Balanced Scorecard and individual objectives
- Development plan steps are monitored and updated
- SAP Learning Solution: individual training courses are monitored and updated
- Enterprise Compensation Management: appraisal results can be used for compensation adjustment proposals
- Business Intelligence / Analytics
- Qualification Catalog
- Profiles: Job and position requirements linked to employee objectives

Benefits of Performance Management include the following:

- Improved overall enterprise performance
- Improved individual employee performance
- Standardized instruments for review process
- Better communication at all hierarchy levels
- Links between the enterprise goals and the planned performance of the employees

Examples of the flexibility of Performance Management include the following:

- Templates provide framework to guide participants through the performance cycle
- Supports best practice performance management processes
- Single screen configuration
- Status and workflow management
- Open architecture for customer enhancements including BAdIs
- Enhanced Analytics

By integrating with Strategic Enterprise Management (SEM) the departmental objectives taken from the company objectives can be displayed in the Balanced Scorecard and the relevant strategic objectives transferred directly to the employees objective setting. Corporate Goals and Values can be created through the Talent Management Specialist role and cascaded through the organizational structures to the templates.

The integration with Personnel Development enables requirements profiles to be taken from the positions requirements. The qualification profile of the employee who has been appraised can be updated after the appraisal process is completed. The integration with Learning Solutions enables appraisal processes for business event and attendee appraisal.

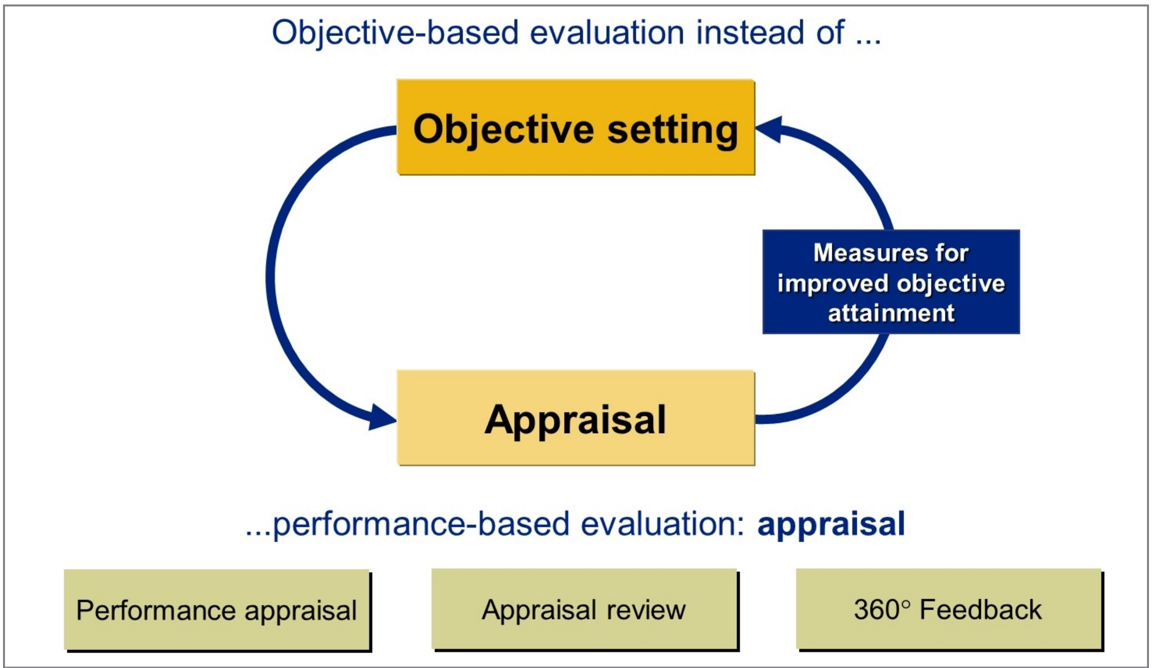


Figure 167: Changes in Performance Appraisal

The appraisal process involves the following processes:

- Manager and employee agree upon objectives
- Company, department, division, and individual goals are taken into account
- Manager and employee review achievement of objectives
- Performance appraisal is closed

Different appraisal templates are available to support different appraisal types such as, subappraisals, or 360° feedback appraisals.

An appraisal process is represented in the appraisal catalog based on an appraisal category and an appraisal template created for this category. The appraisal form is used for creating appraisal documents. The layout of the appraisal template is dependent on the data in the form header.

Functionality allows you to easily see the status of the appraisal. The action log details what has occurred with the appraisal. Links to integration points such as qualifications and Learning Solutions are available if they were included in the template.

The Objective Setting area allows for the entry of free text. Objectives can be predefined in the template or can be added or deleted as you work through the process. Part appraisals allow column access to managers, employees, colleagues who are a part of the appraisal along with a final appraisal column.

Results of the performance review process can be integrated as follows:

- Incorporated in the compensation process by means of compensation adjustments
- Integration with Personnel Development enables requirements profiles to be taken from positions or qualifications from the qualifications catalog. The qualification profiles of the employees who have been appraised can be updated after the appraisal processes have been completed.

- The integration with Learning Solutions proposes courses from the template to appear as mandatory courses in the Learning Portal.
- Depending on the template configuration to the integration with Enterprise Compensation Management, proposals for a compensation adjustment can be accepted as soon as the appraisal process has been completed.
- By integrating with the SAP Business Warehouse (BW), it is possible for comprehensive and complex evaluations, for example, average calculations and comparisons of the appraisals.

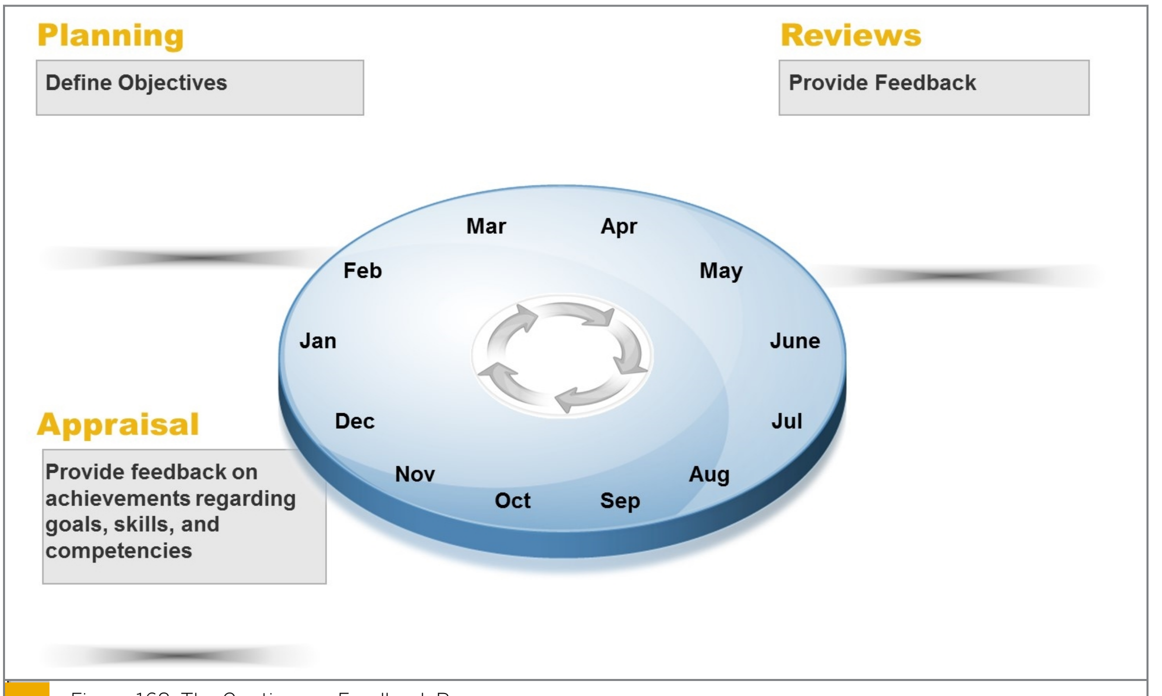


Figure 168: The Continuous Feedback Process

Performance Management supports all the different phases of the continuous performance feedback process.

During an annual objective setting meeting, a manager and an employee agree on goals and the results the employee is to achieve by an agreed date. The objectives can be quantitative (measurable) or qualitative and become a part of the employee's personnel file.

The employee's performance is measured according to the agreed objectives and can be used as a basis for determining the amount of salary elements (for example, bonus). Employees are aware of expectations and how they will be assessed. Periodic reviews are completed during the year to ensure the set objectives are still valid and the employee is on track. If necessary, revised objectives can be agreed upon and adjusted.

At the end of the cycle, the objective setting agreements are evaluated, and corresponding bonus payments or salary adjustments are made. Objectives are then defined for the next period.

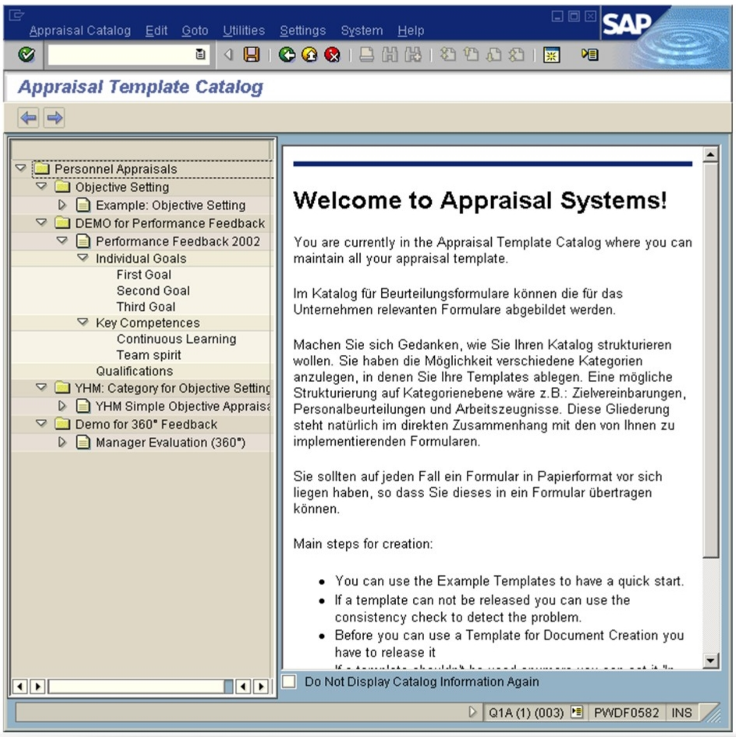


Figure 169: Current Solution Appraisal Template Catalog

Administrators set up templates in the catalog based upon business process requirements.

Note:
Transaction code PHAP_CATALOG_PA is used to set up appraisal templates in the catalog.

Current Solution Terminology

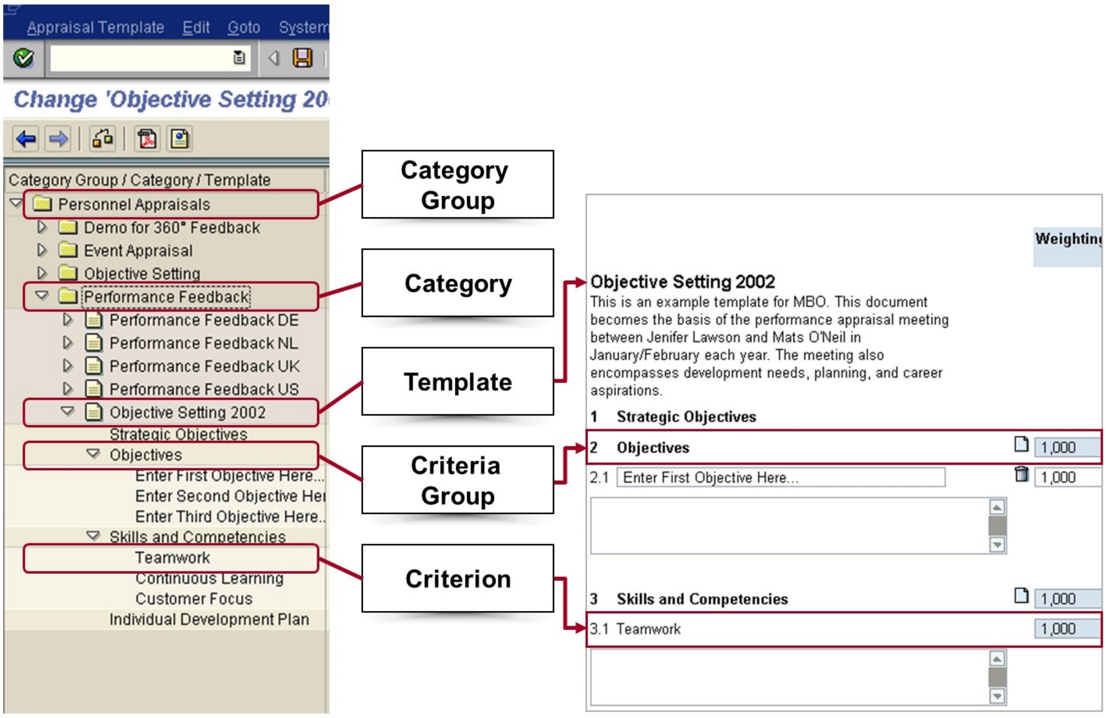


Figure 170: Current Solution Terminology

Appraisal templates can be presented using a Business Server Pages (BSP) application or in a tab format using a flexible user interface or a predefined user interface. An appraisal template has a hierarchical structure.

The hierarchy of appraisal templates include the following:

- Category Group
- Category
- Template
- Criteria Group
- Criteria

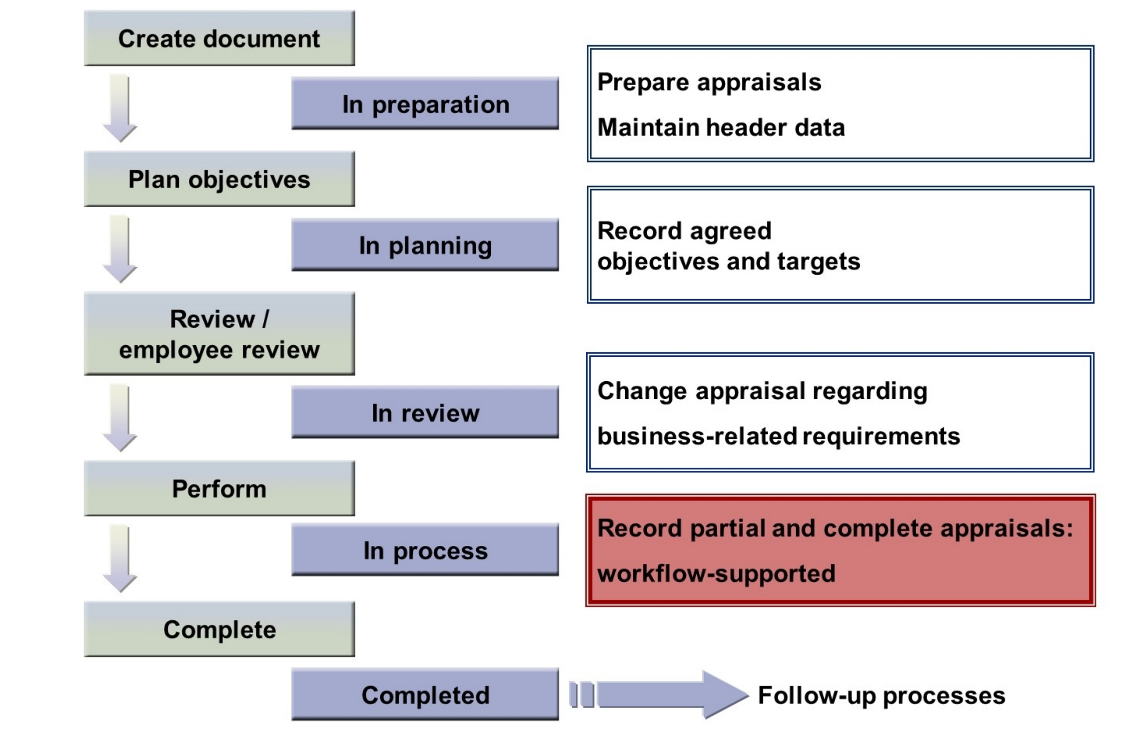


Figure 171: Status Handling

Templates flow through several status changes. These statuses are the main statuses delivered by SAP. With a BAdI you can include your own substatuses to tailor the process to meet your business needs.

Statuses include the following:

In Preparation
: In preparation is the phase in which documents are created for employees. This can be done in an automated fashion or individually by the manager or employee.

In Planning
: In planning is the phase in which the objectives are established and agreed upon.

In Review
: In review is the phase in which the document is left open for change to objectives.

In Process
: In process is the phase in which all part appraisers have access to the document to provide feedback.

Completed
: Completed is the phase where the manager controls the closure of the document following final review and appraisal. Integration to other SAP components can occur as well as initiation of approval scenarios that have been established.

Performance management provides additional statuses to track the approval status of documents.

Additional statuses for performance management documents include the following:

- Approved
- Rejected

- Closed approved
- Closed rejected

Follow-up processes could be workflow-triggered, and be subject to an approval process where, for example, the employee (or another role), approves his or her own appraisal. In this scenario, qualification adjustments and the generation of compensation adjustments would be triggered after approval.

Example of Appraisal Template Structure - Back-end System -1

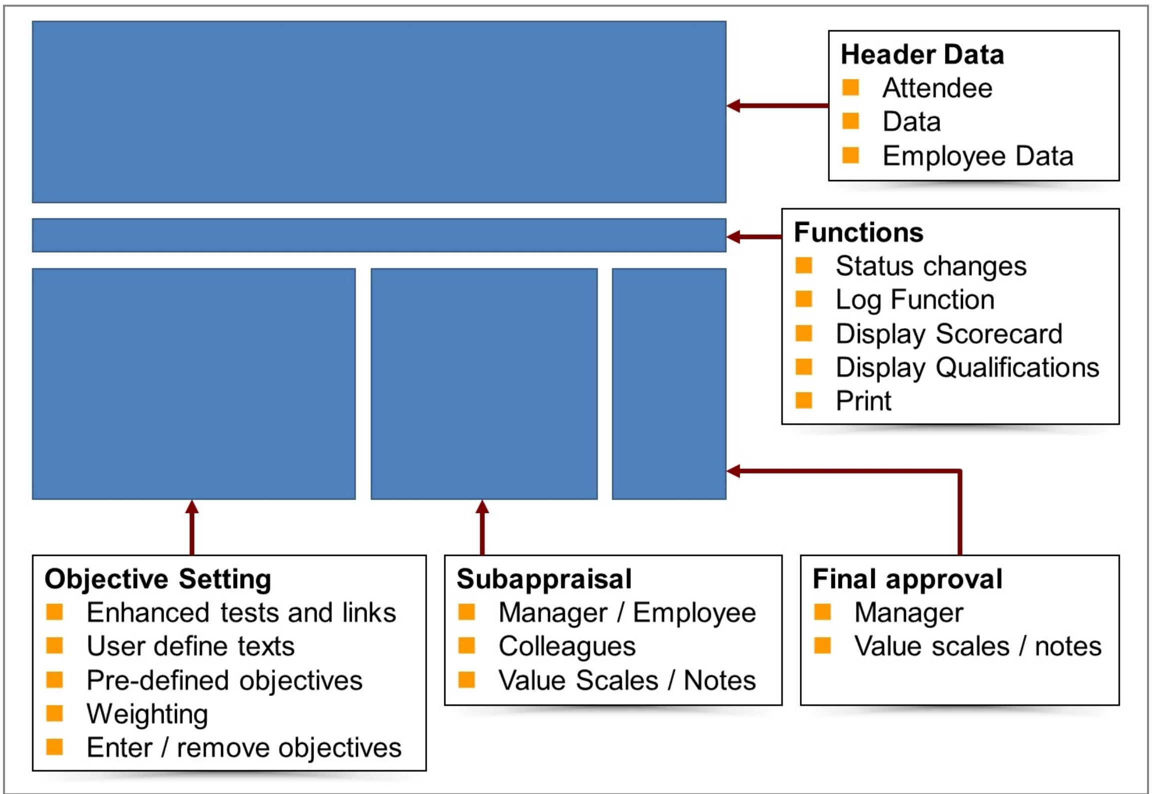


Figure 172: Example of Appraisal Template Structure - Back-end System -1

An appraisal process is represented in the appraisal catalog based on an appraisal category and an appraisal template created for this category. The appraisal template acts as a model in the application process for creating appraisal documents. The layout of the appraisal template is dependent on the data in the template header. The SAP system can therefore visualize the appraisal template if you have entered the necessary data.

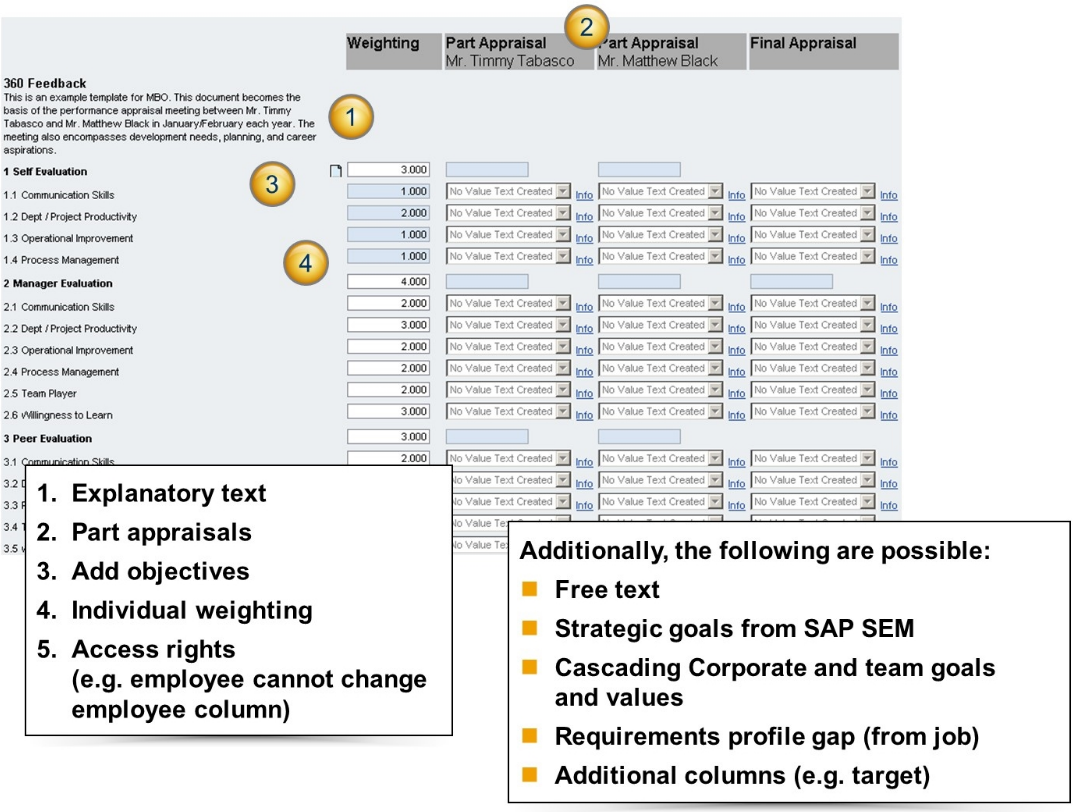


Figure 173: Example of Current Appraisal Object Through BSP Page

Enhancements of Objective Setting & Appraisals through BSP pages (Business Server Pages) include the requirements profile of the job.

You can add additional columns to meet your needs. Access authorizations control whom may access performance management and the activities which may be completed. For example, a manager may not change the employee column.

> Note:
> A link to the employee's development plans is available. This can be configured in the appraisal catalog. The link *Display Individual Development,* opens a dialog box that displays the employee's complete individual development plan with the status, begin and, end dates.

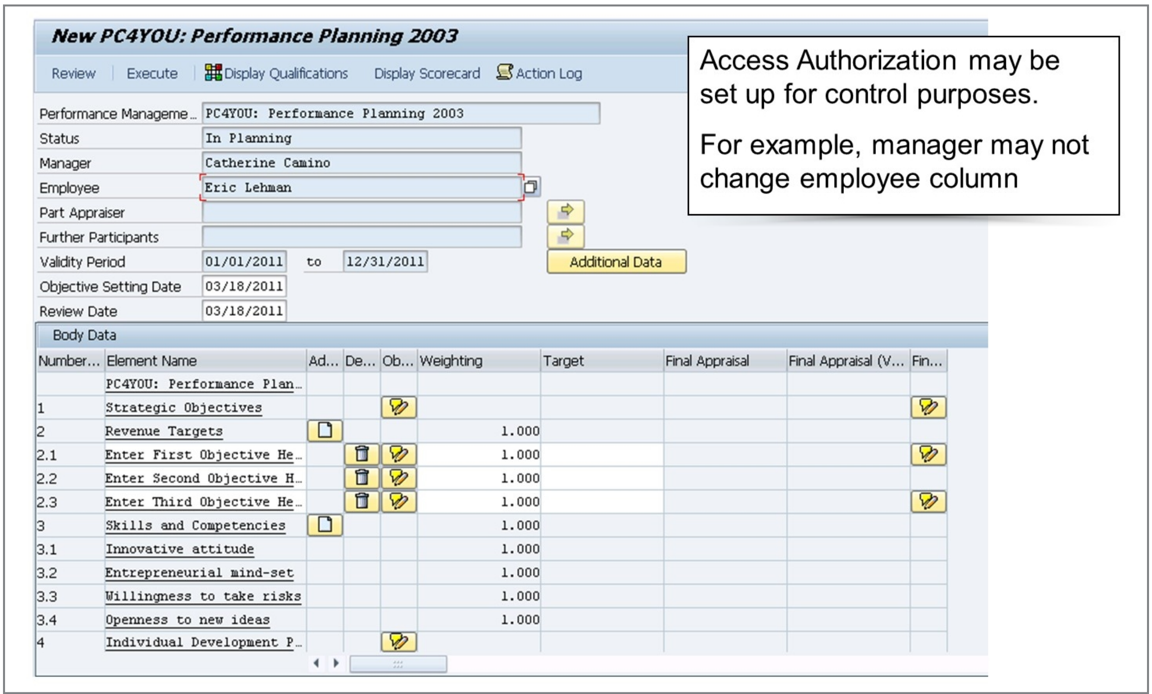


Figure 174: Example of Appraisal Template Structure - Back-end System

Some of the functions included in objective setting include the following:

- Enter custom texts
- Subappraisals
- Add any number of objectives
- Individual weighting
- Objective definition
- Strategic objectives from SAP Strategic Enterprise Management
- Display qualification profile
- Create attachments
- Delete Objectives

Cascading Goals Through the Organizational Hierarchies

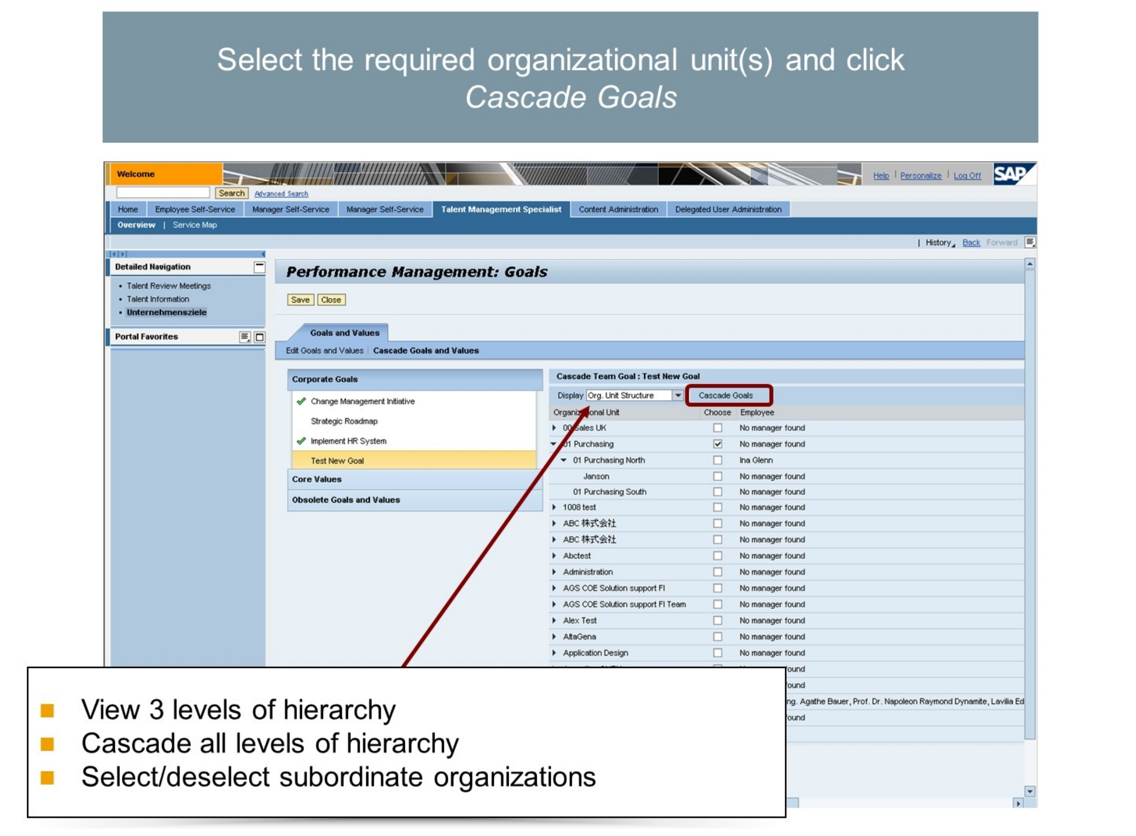


Figure 175: Cascading Goals Through the Organizational Hierarchies

The cascading goals functionality is a Web application. You can determine whether you want to have functionality to cascade corporate goals, core values and, team goals or only a subset of these goals.

With the Predefined Performance Management Process User Interface, you select whether cascading goals should appear in the document. No further action is required as the template is preconfigured. It is simply a checkmark in configuration to determine if they should or should not be a part of the templates.

With the Flexible Performance Management User Interface, you can specify in the appraisal template if and where the goals should appear and what additional goal attributes should appear. The goal title, KPI/Measurement is fixed.

Cascading Goals: Talent Management Specialist Adding a New Goal

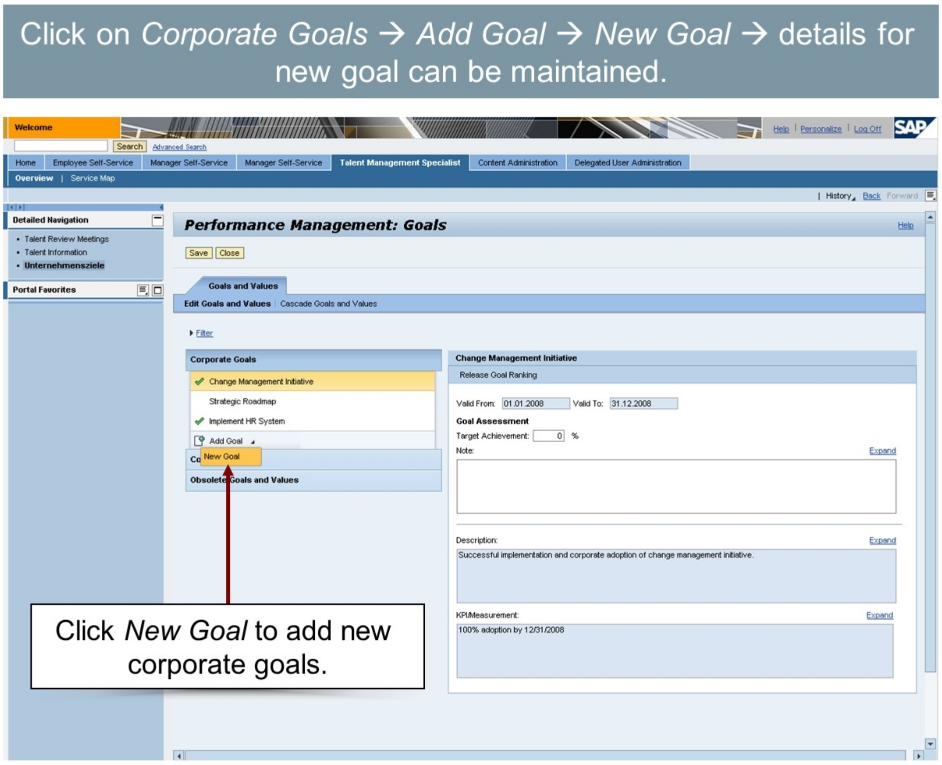


Figure 176: Cascading Goals: Talent Management Specialist Adding a New Goal

Cascading goals allows the Talent Management Specialist (TMS) to create strategic objectives and decide which ones are cascaded. This can be done singularly for each document or for several documents. A service is delivered for the TMS role to develop corporate goals and cascade them and for a similar process for team views that managers can establish for their hierarchy. A delivered strategy is available for the overall company, as well as for team by team goals.

You can maintain and cascade corporate goals and core values to selected organizational units. Once a goal or value is cascaded, it is available in the corresponding employees' performance management documents. Cascading goals is optional.

Example of Appraisal Document through Flexible User Interface

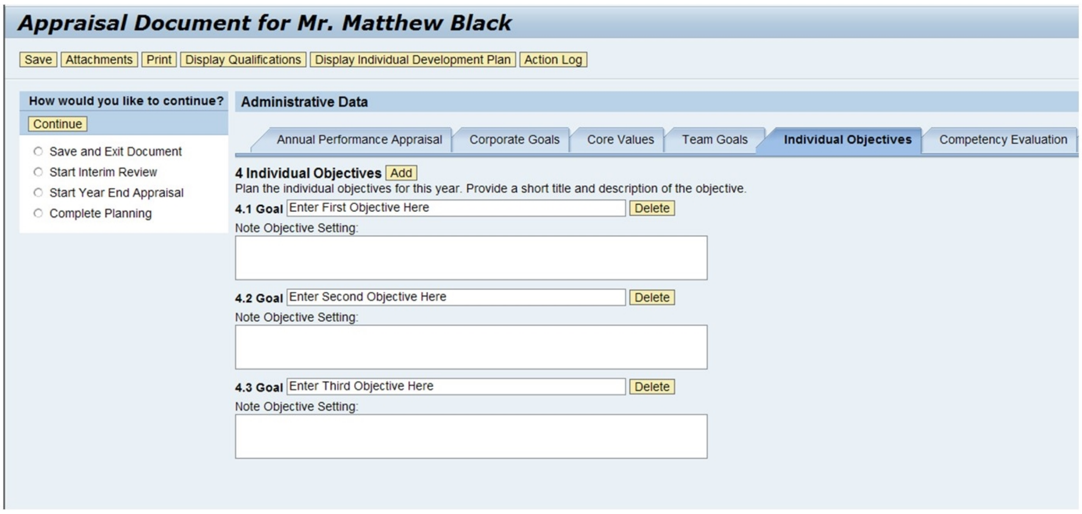


Figure 177: Example of Appraisal Document through Flexible User Interface

The Flexible User Interface relies on the configuration from PHAP_CATALOG_PA and utilizes a Tab and Process flow, which you can configure. All of the BAdIs from the PHAP_CATALOG_PA configuration are available for the Flexible User Interface.

Improvements were added to the Predefined User Interface. These changes include the ability to hide or show the review phase. Easier configuration of year-to-year template changes, the ability to have role based text and to have the ability to have multiple processes available via a BAdI.

Manager Access Predefined User Interface

The timeline at the top of the screen indicates that you are viewing the Predefined User Interface. The Predefined User Interface offers simple configuration and a delivered process flow and tabs. The details regarding the process phase task are displayed in the content box.

Enhancement package 5 changes to predefined user interface templates include the following:

Template Configuration Enhancements

- Hide or show review phase
- Hide or show meeting scheduling step in the planning and review phases
- Allow separate selection of corporate goals, core values, and/or team goals

Process Configuration Enhancements

Reaction on template wizard changes

Allow role-based texts

Make texts for the process available in additional languages

Make multiple processes available (BAdI HRHAP00_PMP_PROCESS)

Manager Access via Manager Self Service

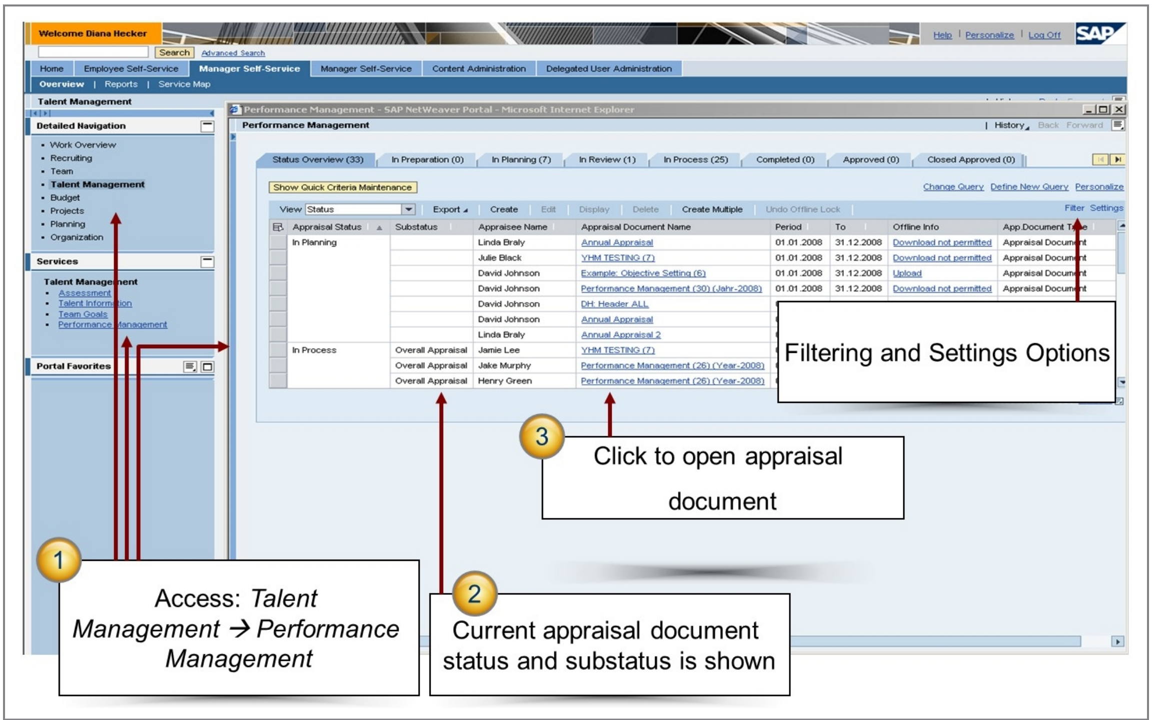


Figure 178: Manager Access via Manager Self Service

In the default role delivery, services for the configuration of flexible performance manager access and team goals are not displayed. They are part of the hidden role delivery.

In the default role delivery, the Predefined Performance Management Process User Interface service is displayed.

If the configuration for Flexible Performance Management manager access is desired, this can be realized via Portal Content Administration.

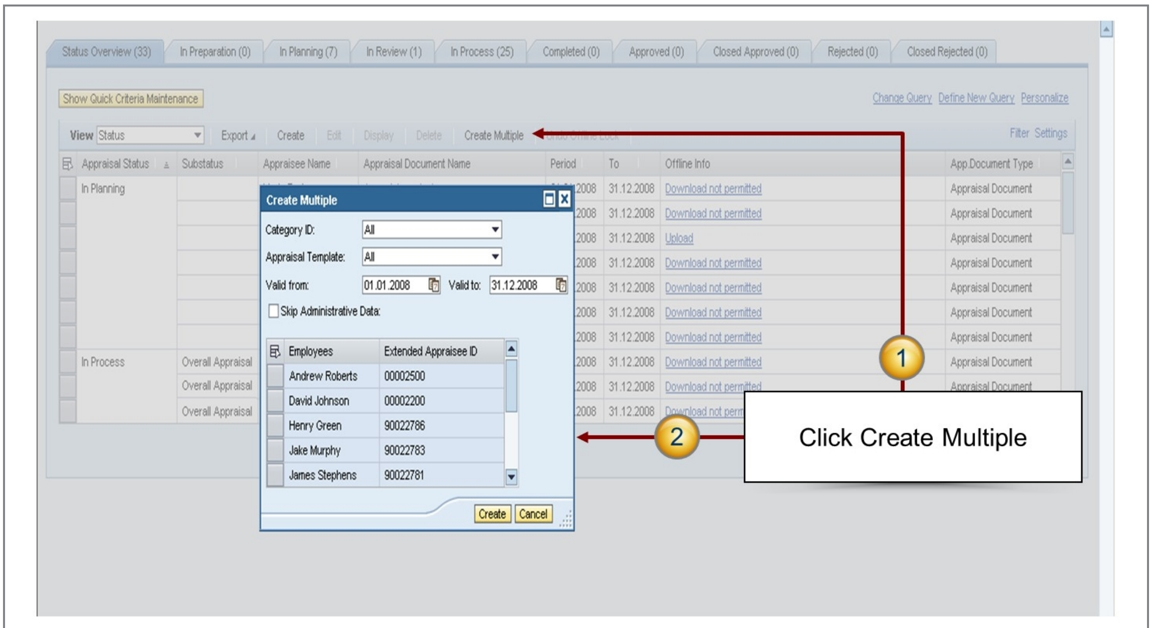


Figure 179: Manager Access Create Multiple Documents via Manager Self Service Flexible User Interface

Most pushbuttons from previous releases have been changed to radio button. Some functionality is enabled by mouse over or hovering over a word which enables functionality.

The manager can choose to create an individual document for an employee or use the create multiple selection to create documents for his/her team.

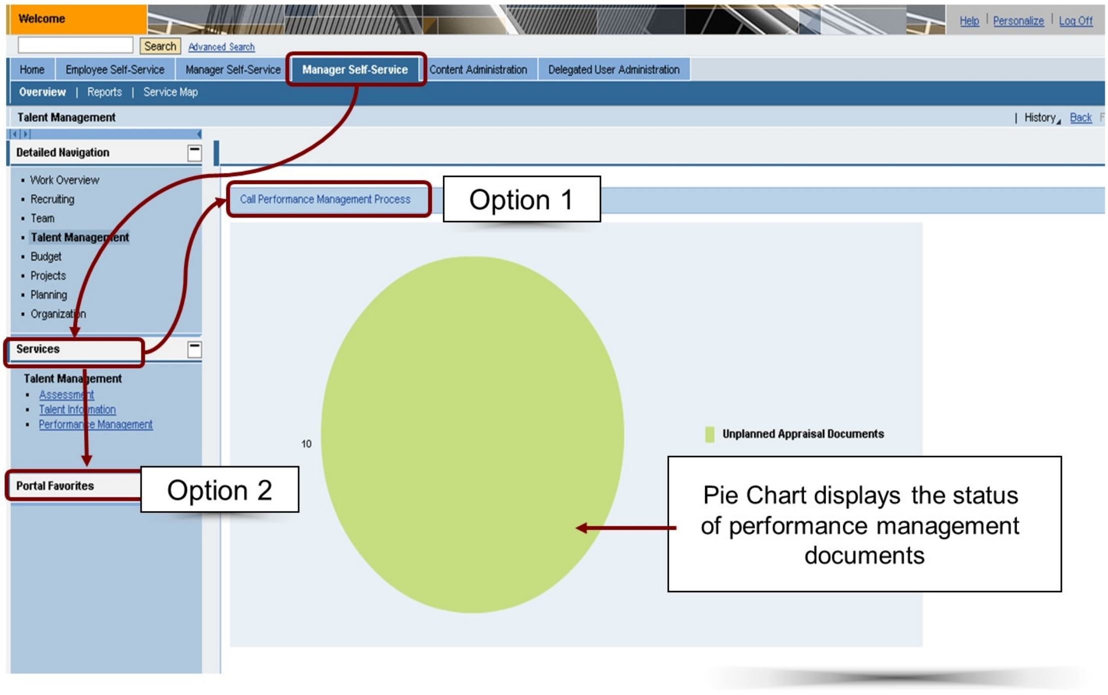


Figure 180: Manager Access Predefined User Interface via Manager Self Service

The default Business Package for Manager Self Service (SAP ERP) 1.41 role delivery, the Predefined Performance Management Process user Interface Service and Pie Chart iView are displayed.

This functionality is available using the SAP NetWeaver Business Client Manager role as well.

If the configuration of Flexible Performance Management is desired this can be done via Portal Content Administration.

Access the predefined employee performance management documents by choosing: Manager Self-Service > Talent Management > Performance Management.

Manager Access Predefined User Interface

Managers can access additional information on the predefined user interface.

Additional information is available on the following tabs:

Tasks
: Displays current and overdue tasks

Employee Documents
: Displays a table overview of all employee performance management documents including their progress. Historical documents can be displayed.

Team Goals
: Managers can create and cascade team goals.

Team Calibration

In the appraisal phase, managers can calibrate employees based on their overall appraisal results.

The phase date is indicated at top of the screen and if you mouse over the bar the date is displayed. The blue line shows where you are in the process. The guidance box displays all information that was configured and guides you through the process.

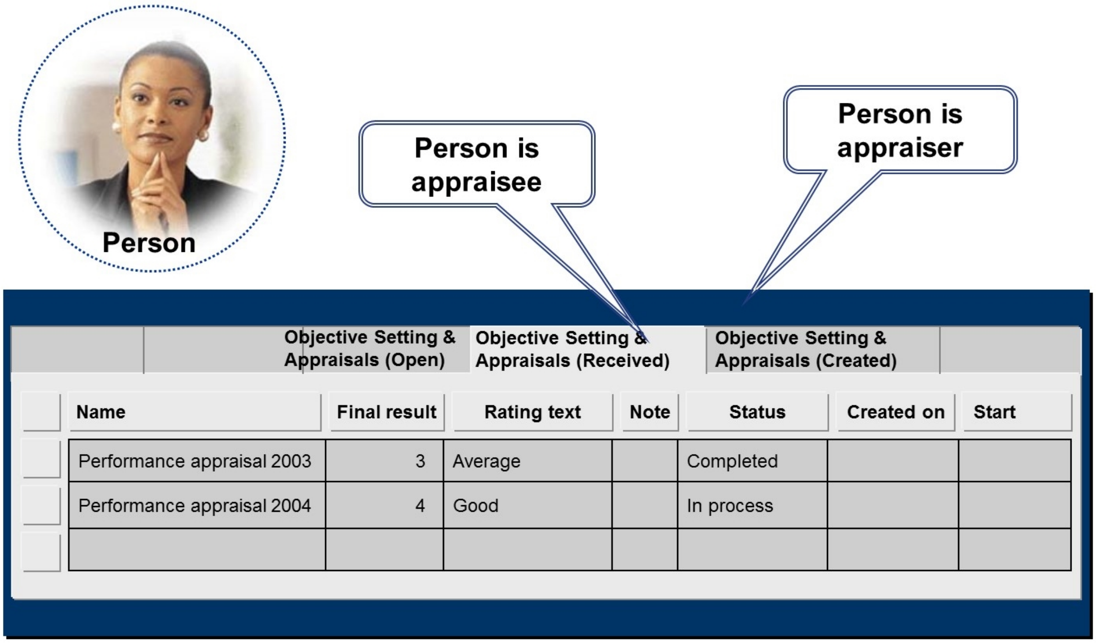


Figure 181: Subprofiles for Appraisals

Documents created via Manager Self-Service are also stored in the personnel development profile. You can display the appraisals in which a person has been involved (either in the role of appraiser or appraisee) from that person's profile.

You can also use these subprofiles to create and edit appraisals.

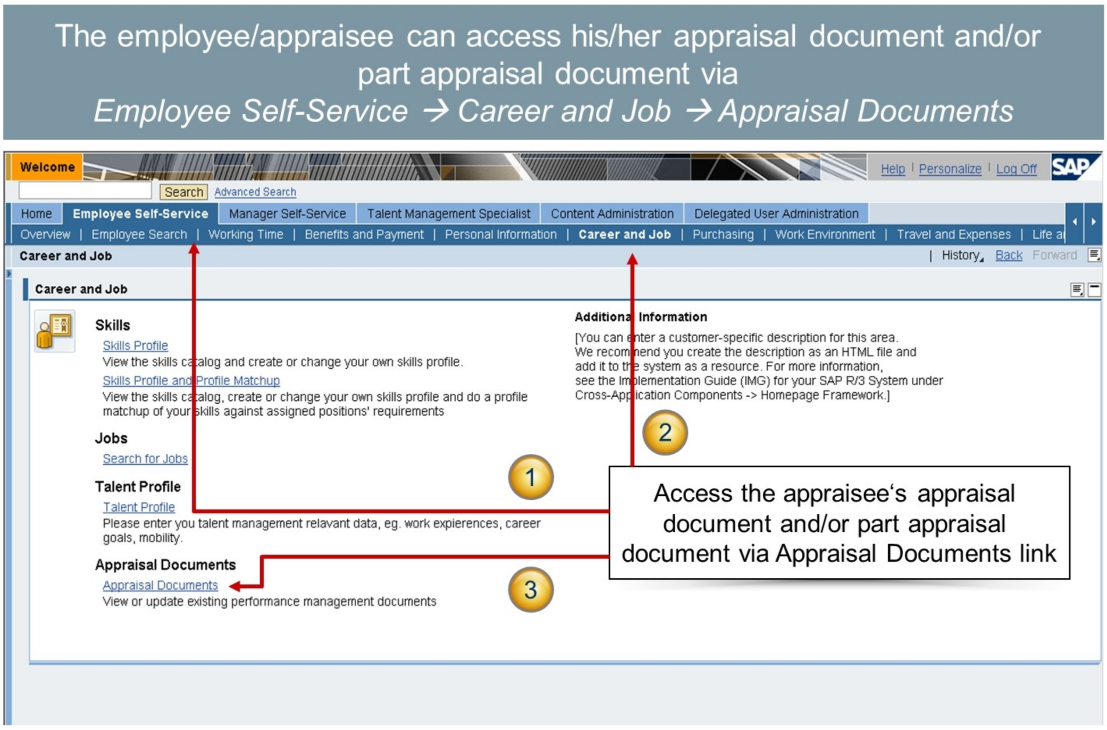


Figure 182: Employee Access via Employee Self Service

The figure displays an employee access screen. Notice in our configuration we have two appraisal document links - customers typically only see one. We show both here to demonstrate the different options. It is possible to use both.

Calibration

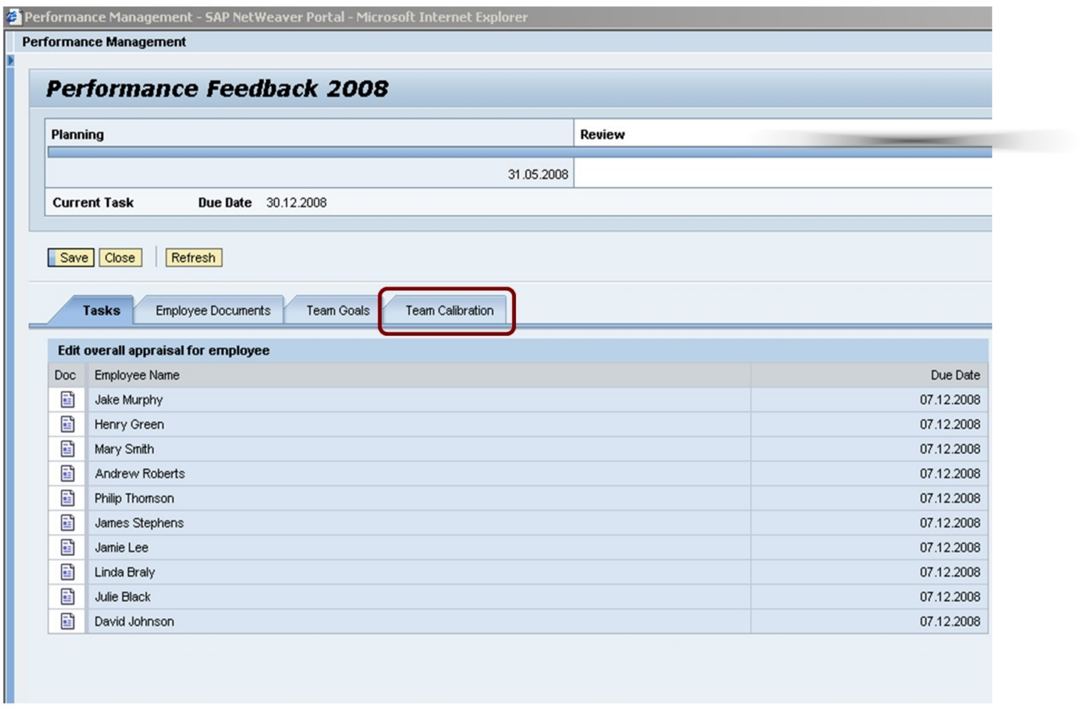


Figure 183: Manager Self Service Team Calibration 1

The Calibration support displayed in the figure is using the Predefined User Interface. The calibration process is focused on a fair evaluation of the employees in direct comparison to peers. This process usually starts with compiling a list of persons to be compared based on the final appraisal (or an overall preliminary assessment) entered by the manager. This is the indicator the calibration is based on.

Once all documents are completed and assessments entered, you activate the team calibration tab for Predefined User Interface. It shows up once the overall appraisal has been assigned. It does not have to be complete.

With this list, different managers and a responsible person from HCM hold a meeting to discuss the results and distribution, as well as necessary changes that have to be made to the final results.

The distribution of the final appraisal results among the chosen employees can be visualized in a chart. The meeting partners can select a specific person, navigate to the appraisal template, maintain the result, and return to the updated graphical overview.

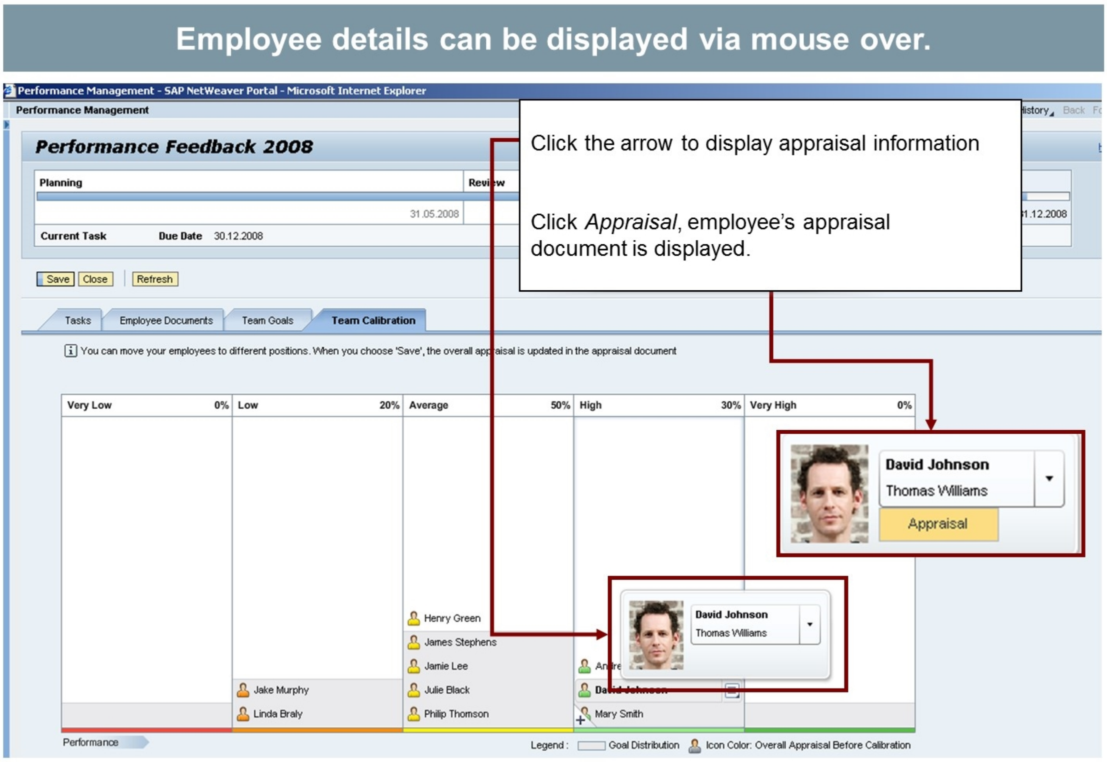


Figure 184: Manager Self Service Team Calibration 2

Average rating is yellow. You can move from box to box and if you click an item, you can navigate to the document to change the overall rating. If you drag and choose save, the rating change is made in the employee document.

Performance Management: Create a New Appraisal Document

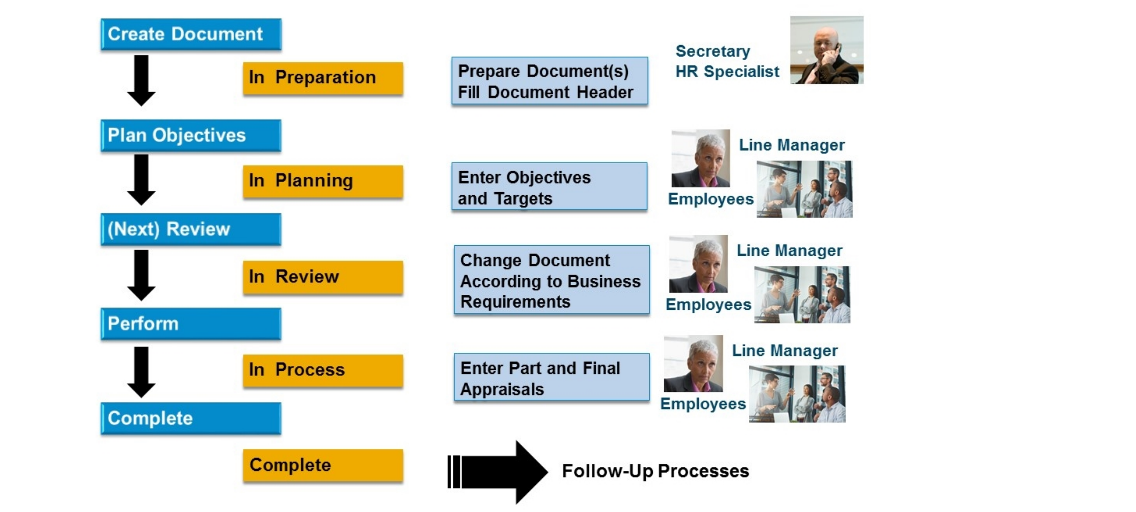


Figure 185: Performance Management

The manager Catherine Camino (Personnel Number 500991##) prepares an appraisal document for her employee Eric Lehman (Personnel Number 500992##) using the transaction APPCREATE, using the appraisal template PC4YOU or another template given by the instructor for the current year.

1. Create the appraisal document.
   a) In the SAP Menu, choose *Human Resources* → *Personnel Management* → *Appraisal* → *Create* → .
   b) Select the appraisal template *PC4YOU*.
   c) Enter the following:

Field	
Manager	Catherine Camino (500991##)
Employee	Eric Lehman (500992##)
Valdity Period	`Current Year`

2. Catherine, the manager, has had an objective-setting meeting with employee and they have agreed on the objectives to enter. Catherine starts the process by entering the objectives and weightings in the document.
   a) Press the *Display Qualifications* button to take the manager to the employees qualification profile.
3. The manager can add qualifications to the employees objective setting agreement. The manager takes the relevant qualifications directly from the *qualification catalog* in the HCM system.
4. The manager saves the document for today or she can review the document immediately.
   a) Therefore, the manager sets the status for the document to *In Review*.

5. We follow through on the entire process including setting the document in process and in completion as the last step in the appraisal process.

6. The manager and employee meet again, and they talk about the employee's achievements during the year. They then enter the final appraisal and complete the document.

> Hint:
> You can display the appraisals in which a person has been involved (either in the role of appraiser or appraisee) from that person's profile by using the transaction *PPPD*.

7. The *Objective Setting and Appraisals (received)* subprofile contains appraisals where the person was appraised. The *Objective Setting and Appraisals (created)* subprofile contains the appraisals where the person acted in the role of appraiser.

> Hint:
> You can also use these subprofiles to create and edit appraisals.

LESSON SUMMARY

You should now be able to:

- Create a performance review

Managing Employee Talent

LESSON OVERVIEW

This lesson introduces the talent management process, talent profiles, and talent review meetings.

Business Example

As a Talent Management Specialist, you are responsible managing the talent within your organization. You are responsible for the maintenance of talent profiles and talent assessment. You require the following knowledge:

- An understanding of talent management processes
- How to set up talent profiles
- How to setup talent review meetings

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Plan the deployment of internal talent

Talent Management

- Global view of available talent
- Managing succession in key positions
- Personalized training offering

Figure 186: Enabling End-to-End Talent Management

Talent Management includes succession planning, performance appraisals, learning solutions, E-Recruiting, and compensation management. Talent Management is based on the

same master data you use for other Human Capital Management processes which reduces integration costs and provides insight into your talent management processes.

Processes and Roles

Several roles are involved in the talent management process which includes managing talent globally, succession planning, and personalized training.

Talent Management processes are executed by the following roles:

Role	Activities
Employee	Employees manage their own talent profile and provide information relevant for succession and talent development,such as the following: • Work Experience • Education • Accomplishments • Career Goals • Mobility
Managers	Managers complete the following activities: • Nominate talents for a Talent Group (such as high potentials) • Assess talents against specific criteria (such as potential, competencies, and risks) • Participate in talent review meetings to discuss talents • Nominate successors • Support employees in their individual development • Complete appraisal documents for their employees during the performance management cycle
Talent Management Specialist	The Talent Management Specialist is responsible for the following activities: • Review information on employees identified as talents • Plan, prepare, and conduct talent review meetings • Group talents by common criteria (such as talent groups - for example high potential, top talent, etc.) • Define key positions • Define successor pools (based on job families on a higher level of consolidation than jobs • Cascade corporate goals and core values • Prepare assessment documents

Talent Profiles

Talent profiles can be updated by the employee, manager, and the talent management specialist. Detailed information is updated on various infotypes.

A talent profile can contain the following information:

Internal Work Experience:

Recently performed activities are retrieved from the employees Organizational Assignment infotype 0001 as a summarized display. The information is stored in the Internal Work Experience infotype 7402. Information on internal projects is also included on this infotype.

External Work Experience:

Configurable drop-down lists are used to maintain external work experience which is stored on the External Work Experience infotype 7403. The drop down list includes the following selections:

- Industry
- Functional Area
- Hierarchy Level
- Contract Type

Education:

This information is stored in infotype 7404. Note: this information is neither retrieved nor integrated with the education infotype in Personnel Administration.

Accomplishments:

Employees provide details of their significant accomplishments outside of their organizations. This information is stored on the Accomplishments infotype 7405.

Career Goals:

When adding career goals, employees can access the job architecture and select the relevant functional area, job family, and the job they are interested in. Note: This list of functional areas are retrieved from the job architecture and this is an important difference to functional areas used for maintaining external work experience. Infotype 7407 Career Goals stores this data.

Mobility:

Mobility selections are included in a drop-down list, which is configurable, and stored on infotype 7406 Mobility. The following selections are available:

- Country Group
- Country
- Areas of Country
- Region

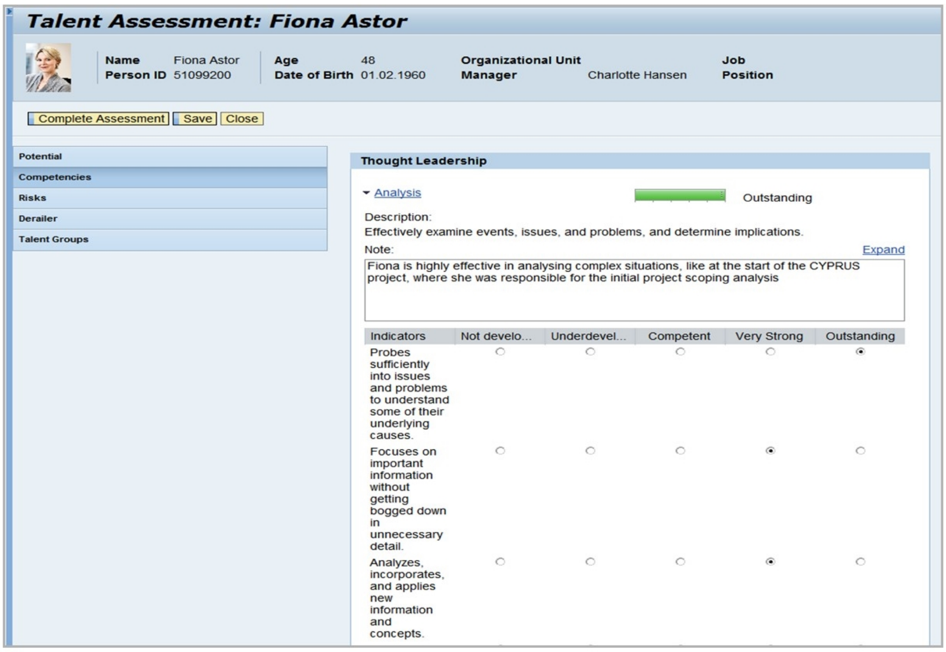


Figure 187: Talent Assessment

The manager can rate the talent based on criteria set up on the assessment form. A description of the criterion is accessible by clicking the triangle in front of the indicator. You can configure the form to allow notes to be included.

The following categories are available:

Potential:

Potential is the appraisal of an employee on how this person could prove himself/herself on the next management level. Potential criteria are used by managers to nominate top talents and high potentials for evaluation and to be discussed in Talent Review Meetings. Information is stored in the new SAP Infotype IT7408 – Potential.

Risks:

Possible risk indicators are: Change Need, Impact of Loss and Retention Risk

Competencies:

Competencies in general are selected sets of qualifications that have special weight for talent management processes. Examples are leadership competencies or languages. When configuring the Competencies form, it is possible to pick and choose the competencies from the Qualification catalog.

Derailers:

To what extent does the employee demonstrate any of the following barriers that commonly lead to derailment of leadership potential? Example: Insensitivity to others when under stress.

Talent Group:

The manager can nominate a talent for a Talent Group and those Talent Groups are maintained by the Talent Management Specialist.

Note:
Talent Groups in Talent Management and Talent Development are used to classify employees for talent management core processes. They are not identical to the Talent Groups in SAP E-Recruiting, which are used to categorize internal and external candidates.

The manager can save the assessment and return to it again at a later time. Once the assessment is set to completed, it is no longer possible to make changes to it. The status of the form changes from in process to completed.

Job Architecture for Talent Management

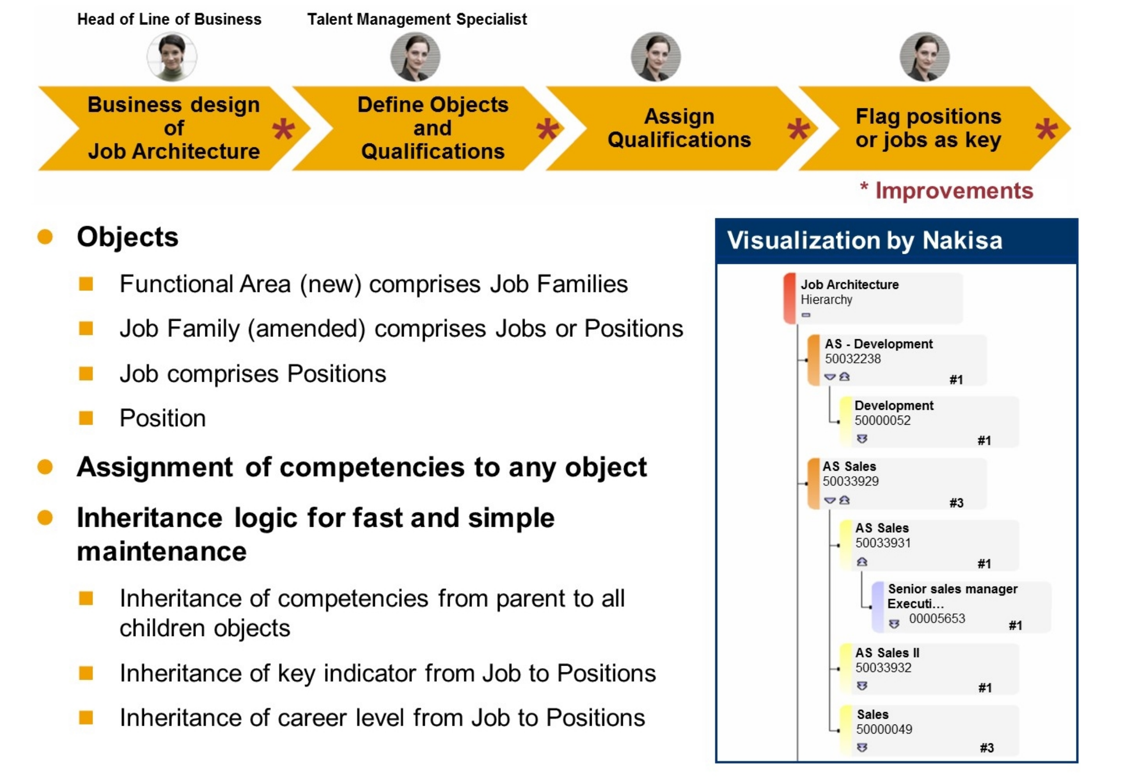


Figure 188: Competency Management Process and Design

The job architecture consists of the job catalog with functional areas, job families, jobs, and positions, and forms the basis for succession planning. To use Talent Management, you must be using Organizational Management and must have configured it accordingly.

The TMS can edit hierarchical relationships between objects and represent them as a tree structure. Inheritance is controlled by the corresponding switch in table T77S0 which must be activated. This switch is not Talent Management specific.

The Talent Management Specialists (TMS) can edit the following objects:

Object	Details
Functional area (object type FN)	Functional area Comprises job families (relationship 450)
Job Family (object type JF)	Job family Comprises job(s) (relationship 450)

Object	Details
Job (object type C)	Job Comprises position(s) (relationship 007)
Position (object type S)	--

TMS can assign competencies (qualifications, object type Q) to the functional areas, job families, jobs, and positions. The competencies are passed on to the entire substructure along the job architecture. This means that you can store key competencies in the system once and thus automatically assign them to the entire lower-level structure.

Talent Groups

TMS use the Talent Groups Web Dynpro application to create and edit talent groups and can enter a title and description for the talent group as well as a standard length of assignment. The data for a talent group is saved on the infotype 7420 Talent Groups.

If a nomination for a talent assignment is approved, this length of assignment is displayed as a default value for the length of talent assignment and can be overwritten as required. For example, for a talent group that represents a program, the length of the assignment corresponds to the length of the program.

Support Team

Members of the support team of a talent group can edit and assign talents to the talent group. Attachments, such as a description of the talent group or program, can be uploaded.

Functions available to the TMS include the following:

- Displaying all talents for which there is a nomination for this talent group or whose assignment was approved or rejected.
- TMS can nominate additional employees for the talent group or directly assign them to the talent group as approved.
- TMS can state who approved the assignment or rejection.
- TMS can enter notes
- TMS can choose Export to download an Excel list with the talent data of a talent group, for example, to conduct a talent review meeting.

Talent Review Meeting Infotypes

- Administrative support for the TMS on setting-up and preparation, as well as monitoring of the Talent Review Meeting
- Handout for the participants to provide full documentation on preparation
- Interactive Grid leveraging Adobe Flash Island technology

Figure 189: Talent Review Meeting Process and User Experience

The talent review meeting is set up by the TMS and infotype records maintain the details.

Infptypes which maintain the details of the talent review meeting are as follows:

- Talent review Meeting Basic Data: infotype 7431
- Assigned Objects: infotype 7432
- Participants: infotype 7433
- Agenda Topics: infotype 7434
- Documents: infotype 7435
- Dates: infotype 7436
- Persons Responsible: infotype 7437
- Potential: infotype 7408
- Performance: infotype 7409

Talent Review Meeting Setup

Task of Talent Management Specialist

- **Wide range of customizable data specifying the Talent Review Meeting:**
  - Title of the Talent Review Meeting
  - Select Organizational Unit(s) for this Talent Review Meeting
  - Category,
  - Management level – Important for Cascaded Talent Review Meetings and their Potential & Performance rankings hierarchy
  - Scheduling of the meeting and language
  - Set-up the timelines for preparation
  - Define specific support team
- **Select participants from the organizational structure**
- **Create handouts for preparation purposes**
- **Set the status of the meeting**

Figure 190: Setting up a Talent Review Meeting

The talent review meeting can contain information on the following:

Category:
: Global Talent Review Meeting or Local Talent Review Meeting

Level:
: TMS specifies the hierarchy level for the review meeting. If the same talent is discussed in more than one talent review meeting (cascaded talent review meetings), the performance and potential assessments made in the talent review meeting at the highest hierarchy level are decisive. Information is stored on infotypes 7408 Potential and 7409 Performance.

Support Team:
: The TMS creating the talent review meeting is assigned as the processor. Additional talent review specialists can be assigned various roles. All support team members can have the same authorizations for planning, preparing, and conducting the meeting.

Handout:
: The TMS can select the information to be included in the handout (short or long profile of talent, agenda topics, etc.).

Status:
: The TMS can maintain the status of meetings and can withdraw planned meetings as required. The status of a meeting can also be reset. A talent review meeting with a status of completed can not be changed but the status can be updated.

Talent Meeting

An overview of all talents nominated to participate in a talent review meeting is displayed in the talent monitor which is defined in customizing.

Interactive Grid

- **Potential x performance grid**
- **Adobe Flash Island for interactive and intuitive user experience**
- **Drag-and-drop for fast changes in performance and/or potential (subject to customizing)**
- **Different views – Grid, Business Card, List**

Features

- **Three aggregation levels of talent information**
  - Mouse-over business card
  - Short profile
  - Long profile
- **Easy and flexible ways to approve talents**
- **Ability to take notes online**
- **Enhanced filter options**
- **Compare several talents side by side**

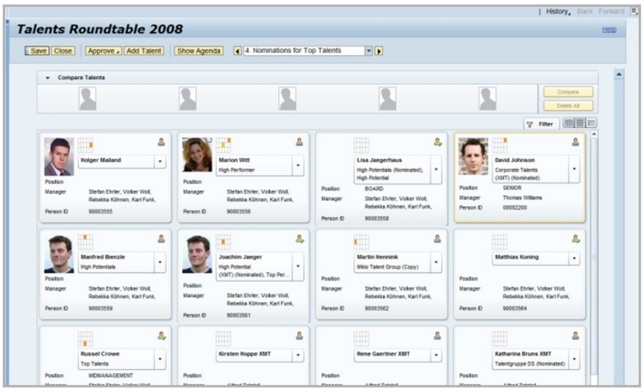


Figure 191: Conducting a Talent Meeting

During the talent review meeting, the participants can see the talent data for all nominated talent to discuss, compare, and calibrate the talents in the grid. Talents can be displayed in a grid view, business-card view, or list view.

This function provides you with an overview of all talents nominated for a talent review meeting and their managers. The display of the talents in the talent monitor is based on search configurations that you define in Customizing.

Integration

Integrating Performance Management and Talent Management is a business decision. Performance rankings are stored in the performance management document plus the Performance infotype7409.

The performance ranking is used in the performance management process as well as the talent management process. The performance document is the only document the employee agrees upon with his/her manager and it serves as the legally binding document, which cannot be changed once the employee and manager agree. Your business process determines how you will configure your system.

Configuration options include the following:

- Ranking from the performance document is the only valid one and cannot be changed, and there is no other performance ranking. In this case infotype 7409 contains the same

content, and in the talent calibration no moves can be done in the grid changing the performance.

- The ranking from performance document remains the valid one and cannot be changed in this document, but the content on the performance infotype 7409 may differ, as the talent calibration may come to a different result. If managers in Talent Review Meetings, (for example, the Executive Board), review the performance and agree to amend the performance ranking, it is possible to configure the system accordingly. If there is a follow-up discussion with the employee, or whether this information remains solely Management information is defined by your business process.

Succession Planning

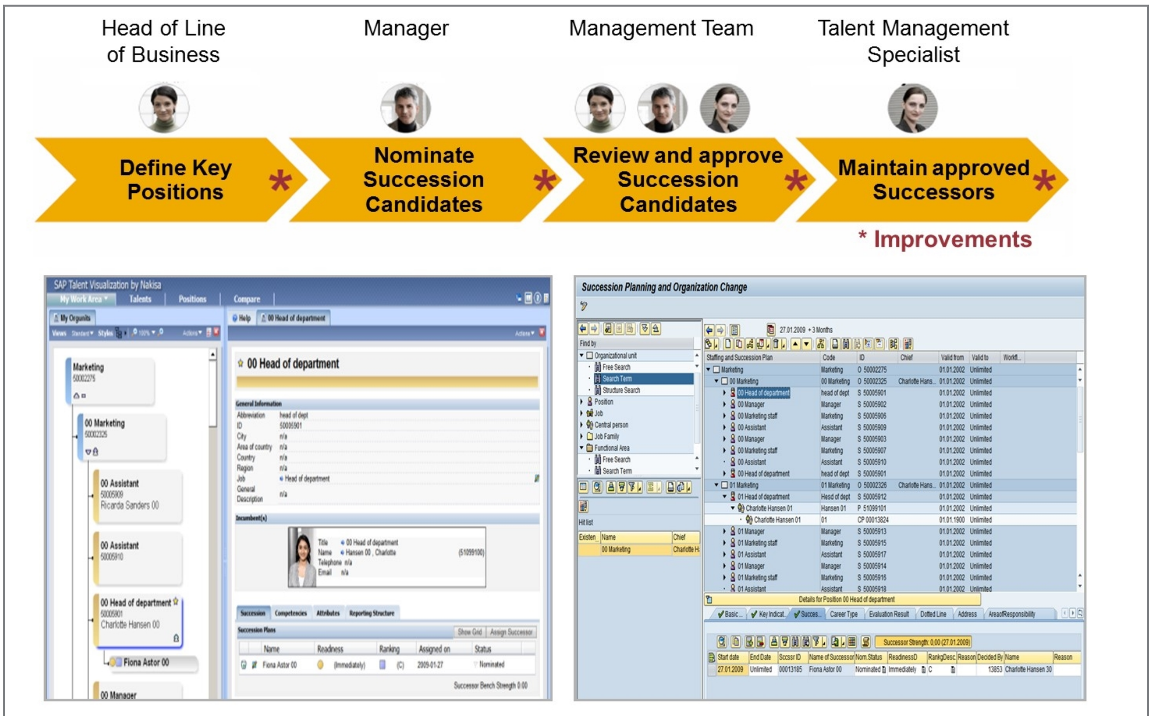


Figure 192: Succession Planning Process and User Experience

Key positions can be flagged in Succession Planning or in Job Architecture and succession plans can be created for positions, and successor pools for job families.

A succession plan can include the following content:

Key Position Flag:

- Stored in new infotype 7400 - Key Indication
- Succession relationship between Position (S) and Employee (CP)
- Indicator for position (S) can be inherited from job (C)

Relationship - Successor For:

- A740 - is successor for
- Readiness
- Rank

Potential for Job Family:

- A744 - Has potential for
- Readiness
- Rank

BAdI:

- Successors bench strength - HRTMC_SUCCESSOR_BENCH_STR
- Setting and re-setting of key indicators - RPTMC_SET_KEY_INDICATION

With succession planning you can mitigate business risks associated with talent decisions.

Examples of business risks you can mitigate include the following:

Vacancy Risk:
: Risk of key positions being vacant, hence a risk of lost business

Readiness Risk:
: Key positions staffed with underdeveloped successors

Transition Risk:
: Key positions staffed with the right successor at the wrong time, hence a risk of poor assimilation into the organization.

LESSON SUMMARY

You should now be able to:

- Plan the deployment of internal talent

Learning Assessment

1. The Performance Management supports all phases of a continuous performance feedback process.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. The Performance Management supports all phases of a continuous performance feedback process.

   Determine whether this statement is true or false.

   - [x] True
   - [ ] False

   Correct. It supports planning (that is the formulation of objectives), the employee review (feedback), and the appraisal.

UNIT 10 End-User Self-Services

UNIT OBJECTIVES

- List the advantages of self-services
- View a team calendar as a manager
- Update dependent information using SAP NWBC

Unit 10
Lesson 1

Analyzing Self-Services

LESSON OVERVIEW

This lesson shows you how to use manager and employee self-services. For this reason, you require the following knowledge:

- A good understanding of self-services
- A good understanding of HCM self-services

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- List the advantages of self-services
- View a team calendar as a manager
- Update dependent information using SAP NWBC

The SAP Enterprise Portal

The SAP Enterprise Portal offers a central point of access for all applications, business intelligence functions, documents, and Web services at a company. The SAP Enterprise Portal is a user-oriented platform where users can draw on information from various sources and cooperate with internal and external colleagues.

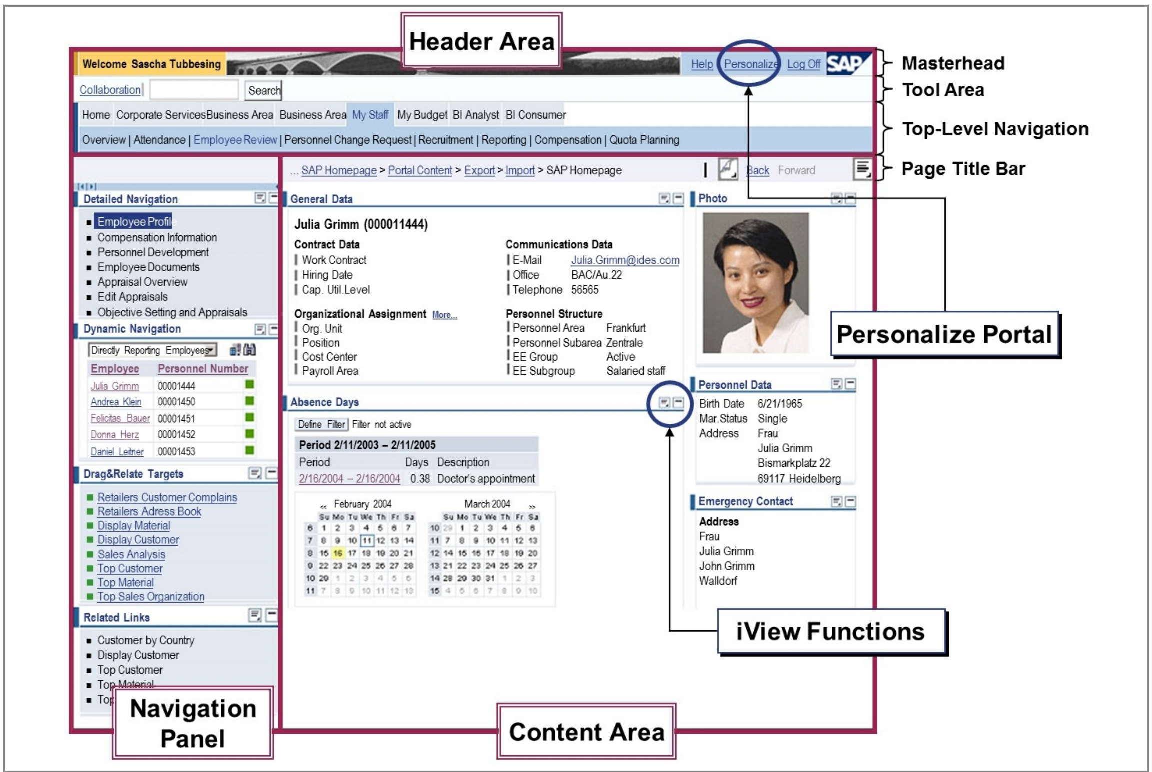


Figure 193: The SAP Enterprise Portal (SAP EP): Look and Feel

Advantages of an SAP Enterprise Portal are as follows:

- The SAP Enterprise Portal provides a central point of access for all applications and systems.
- Only one portal is required for all applications and users.
- Provides more than just access to all systems:
  - Provides content management
  - Provides collaboration rooms for teams
  - Screen areas from diverse systems displayed on one page

The two main elements of the SAP Enterprise Portal are the navigation area and the work area. Navigation is divided into top-level navigation, which covers the top two rows, and detail navigation, the Navigation Panel, which is located on the left of the screen. The work area (content area) can consist of just one or various iViews. An iView is the smallest unit. You can define which information is displayed for each iView. An administrator can put the iViews together in displayable pages (such as in the above example).

New Role: HR Administrator

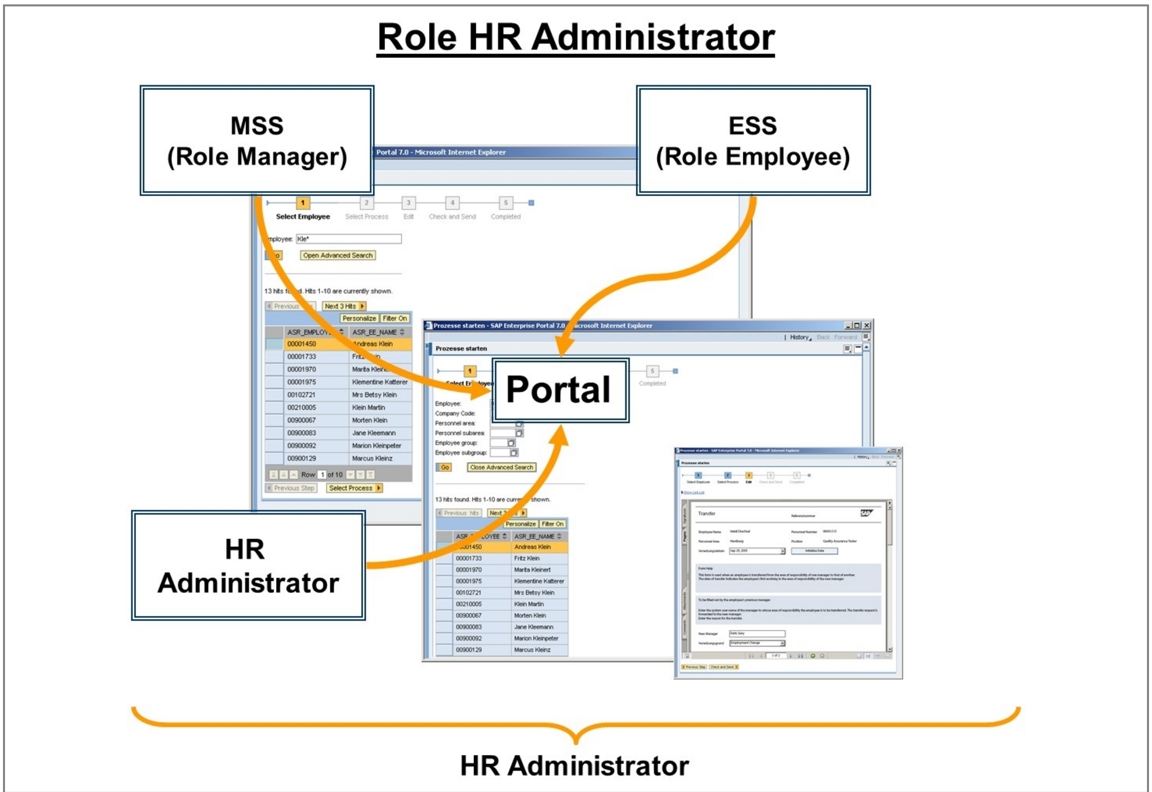


Figure 194: Role: HR Administrator for MSS and ESS

As of ECC 6.0, the role HR administrator exists in the portal. This role enables HR administrators to carry out a number of processes, depending on their authorizations, for example maintain employee data, maintain workflow-triggered processes and generate HR-specific reports.

Employee Self-Service

Employee Self-Service (ESS) utilizes the same database as ERP. No dual maintenance or reconciliation is required.

With ESS, employees can take responsibility for updating and keeping their own data current. ESS empowers employees to view, create, and maintain data any time, anywhere, using Web-based technology. ESS allows you to off load many of the data entry and related customer service activities that may typically be performed in a company's human resources, payroll, benefits, and travel departments.

Examples of components which can be included in SAP ESS include the following:

- Time Management
- Payment
- Benefits
- Personal Information
- Appraisals
- Qualifications

Highlights of Employee Self-Service include the following:

- Extensive functionality beyond basic HR including travel management and purchasing
- Integration between SAP system business scenarios, SAP ESS, and workflow
- Global availability of all functions
- Access from any platform, from anywhere, at anytime
- Easy to use
- Personalized

SAP Employee Self-Service and Workflow

The Portal contains links inside and outside a company's boundaries. Integration of the SAP office inbox in ESS opens workflow to all employees. Examples of ESS services which use workflow include approval processes for leave requests, time entries, and expense reports.

Links can be made to the following:

- Non-SAP Business Suite components
- External systems using open Internet standards
- SAP Business Suite components - classic and new Web-based SAP system transactions (SAP Standard system, New Dimensions, Industry Solutions), reports (for example, Business Warehouse reports), as well as Knowledge Warehouse contents.
- SAP Internet services - Service Marketplace
- Any Internet or intranet Web sites

Employee Self-Service: Area Group Page

Figure 195: ESS in SAP ERP 6.0: Area Group Page

The scenarios are displayed in the portal. The Home Page or Area Group Page introduce the Employee Self-Service application to the employee. These pages can be customized in the back-end system.

ESS services based on Web Dynpro include the following examples:

Area	Activities
Time Management	• Leave request • Cross Application Time Sheet • Time Statement • Time Correction
Payment	• Pay Statement • Total Compensation Statement • Employment and Salary Verification
Career	• Skills Profile
Personal Information	• Address • Bank information • Family Member / Dependent • Personal Data
Employee Search	• Organizational Chart • Office Data • Communication Data
Travel Management	• Travel Planning • Expense Report
Country-Specific Scenarios	• Tax Forms • Pension Reports

The following diagrams show a roadmap for business processes in the area working time, based on Web Dynpro. You see an example, *Leave Request scenario*.

Area Page: Working Time

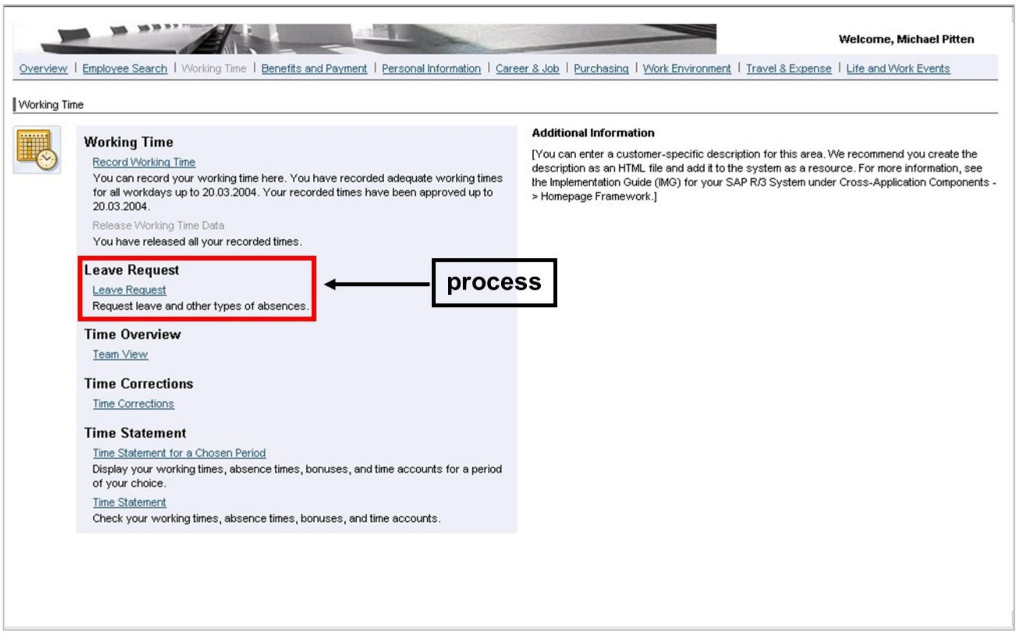


Figure 196: Area Page Working Time

ESS Area Page Working Time - All applications are shown on the left side, including some short information. By choosing the links the application starts. On the right side, the customer can place individual information. It is also possible to integrate an HTML page here. Time off is normally planned and requested on relatively short notice. You enter your leave request using the appropriate Employee Self-Service application.

Leave Request Calendar

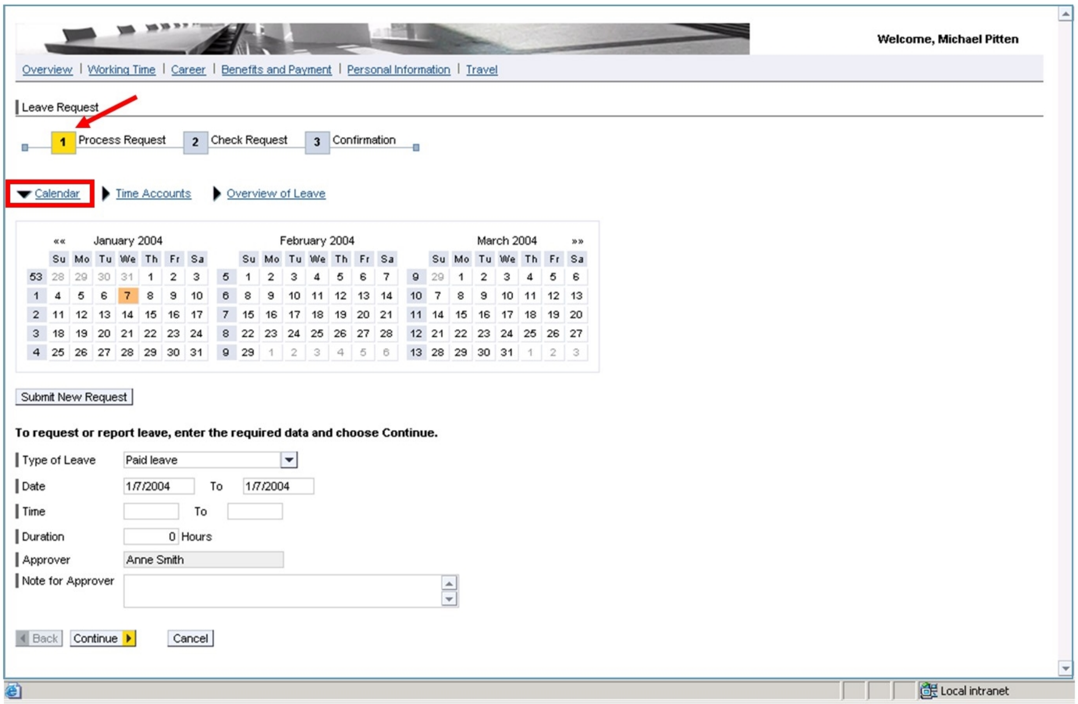


Figure 197: Leave Request: Calendar

A calendar is displayed on the leave request form, which includes an overview of all leaves taken and submitted. The employee can select the requested period for the new leave, review the data prior to submitting the request. Depending on your business requirements, the leave may be forwarded to the manager for approval using workflow. The employee receives confirmation once the workflow request is processed by the manager.

To review SAP Enterprise Portal services.

To review capabilities of ESS.

Manager Self-Service

Manager's Tools and Communication Today

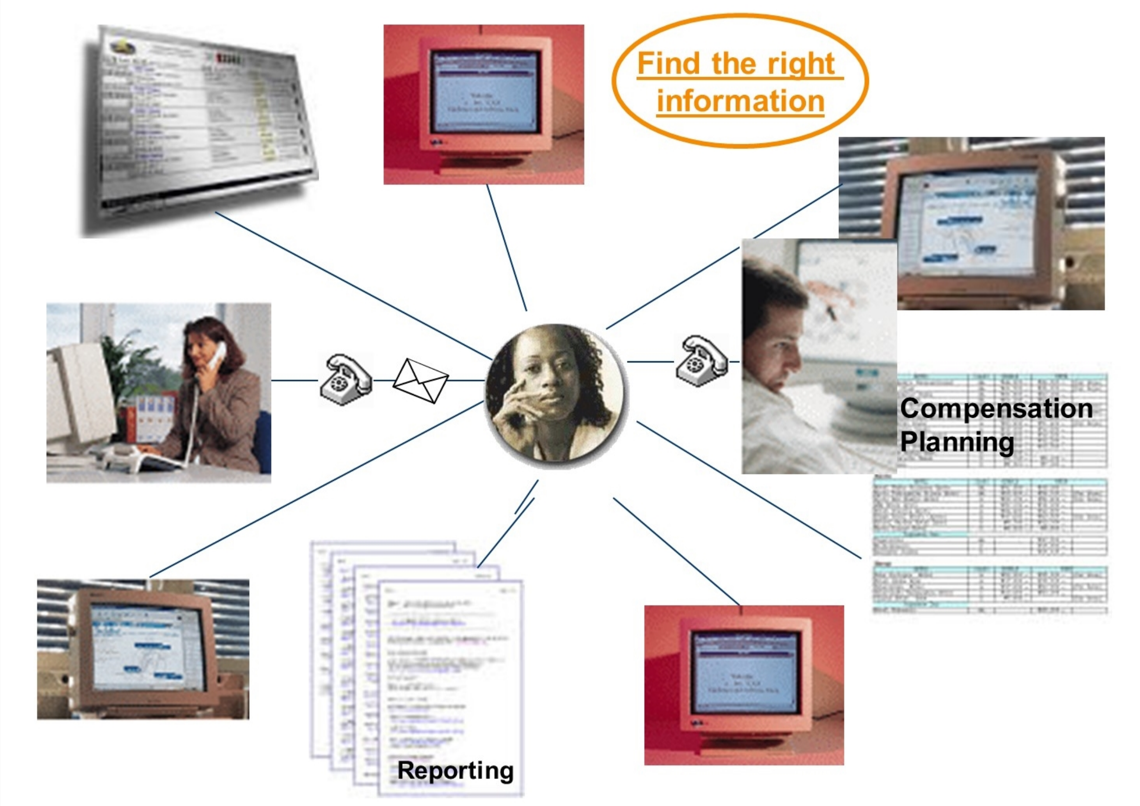


Figure 198: Manager's Tools and Communication Today

Managers must perform many tasks such as budget and headcount planning, initiate personnel changes and transfers, process compensation recommendations, and complete performance reviews. To do this, managers require accurate information available real-time, including the appropriate tools and reporting capabilities.

Manager's Self-Service

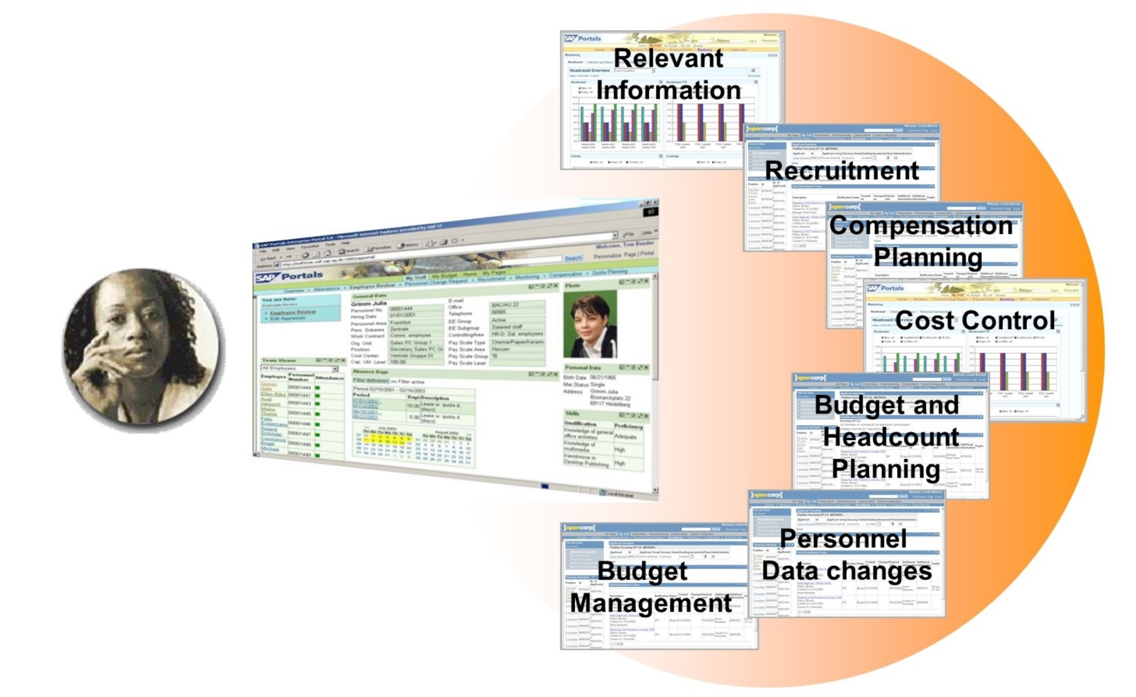


Figure 199: Manager's Self-Service: Single Point of Access

Manager Self-Service (MSS) consists of a set of easy to use tools, transactions, and reporting capabilities that gives managers a single point of access to manage their employees and budgets efficiently, effectively, and proactively. MSS integrates different systems and this supports managers in performing their tasks as access to information is seamless and all in one place.

MSS includes key performance indicators, alerts, and analytical reports empowers managers to plan for the future and react to critical situations. MSS enables consistent management across the organization.

The Single Point of Access enables managers to access tools and reports in one single Web interface. Applications are specifically tailored to suit the individual requirements of managers and are intuitive to use.

Example of tasks Managers can complete using MSS include the following:

- Obtain relevant information
- Participate in recruitment activities
- Perform compensation planning
- Control costs
- Perform headcount planning
- Perform budget planning
- Initiate change requests for their staff

Reporting

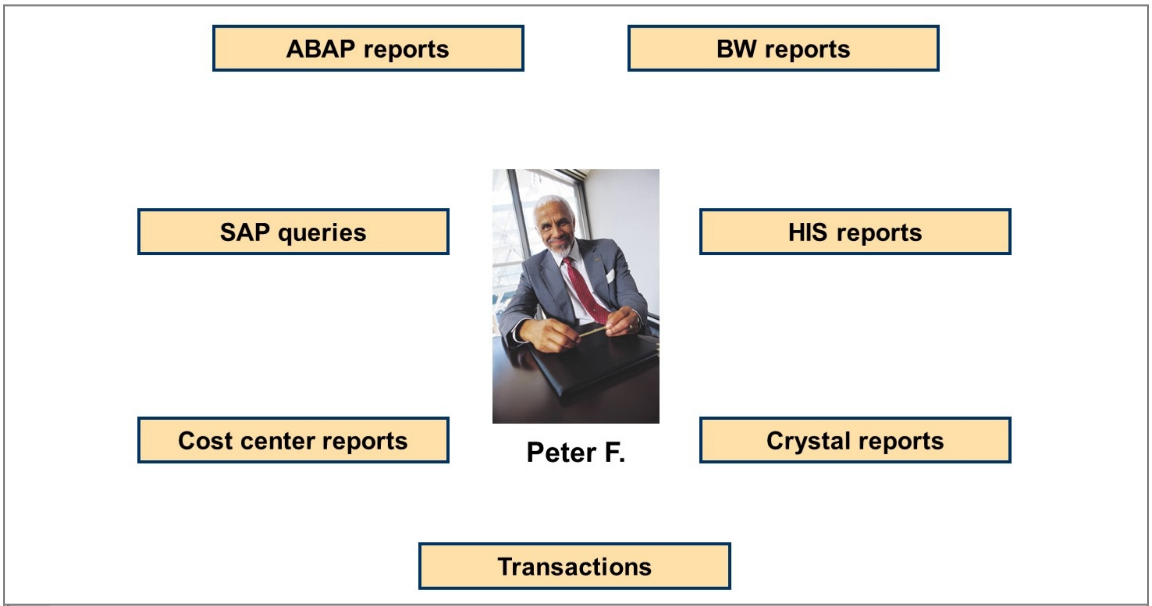


Figure 200: MSS Provides Access to All Reporting Information

MSS provides access to many reports which can be based on the following technologies: ABAP report, Query Reporting, SAP Business Warehouse, Web reports, and SAP ERP 6.0.

The report selection is based on Manager's Desktop (MDT) customizing. This give users who have previously used Manager's Desktop and now want to change to Manager Self-Service a great advantage. The majority of MDT Customizing can be reused for MSS. For example, you can reuse reports, information, and transactions that you developed especially for your line managers that were not provided by the standard SAP system. You can easily incorporate those functions into MSS.

End User Business Perspective

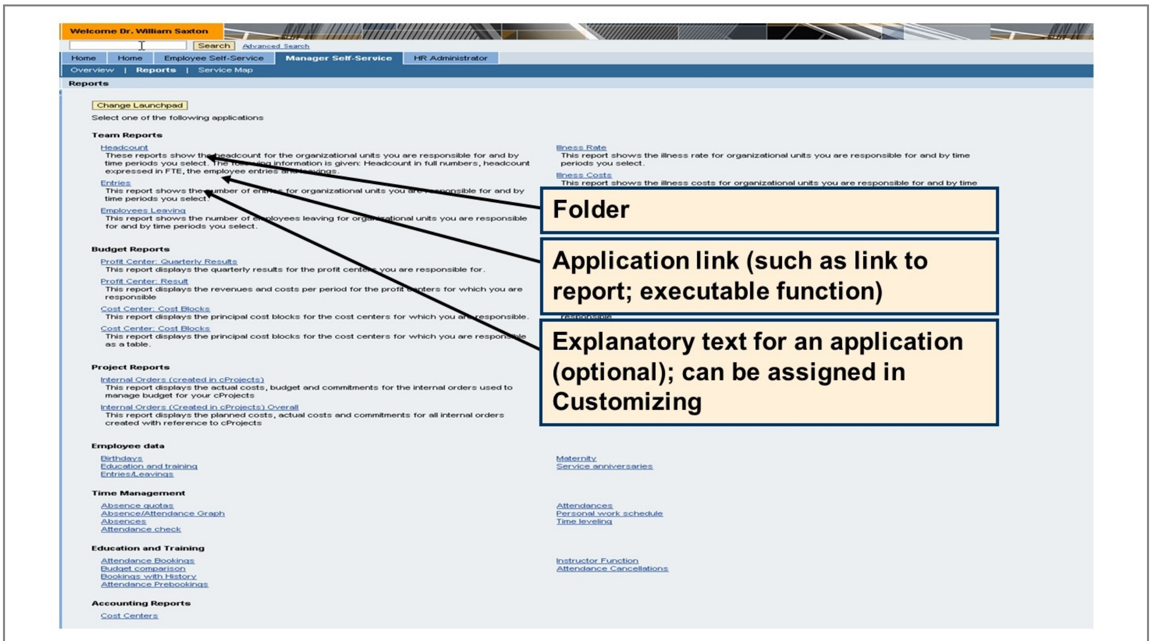


Figure 201: End User and Business Perspective

Delivered MSS content includes the following:

- Work Overview
- Team
- Talent Management
- Budget
- Projects
- Planning
- Organization

To review the benefits of Manager's Self Service.

SAP NetWeaver Business Client and Self-Services

SAP NetWeaver Business Client (NWBC) is a desktop client that offers a single point of entry to SAP applications. It provides a solution for hosting classical dynpros (SAP GUI UIs), Web Dynpro applications, Business Service Pages(BSP), portal pages, and other content. You can use SAP NWBC either with or without the portal depending on whether you want to access ABAP (Advanced Business Application Programming) back-ends directly or not. NWBC runs on Windows XP and Windows Vista. The installation of SAP NWBC is straightforward. It uses SAP setup just like SAP GUI.

SAP NWBC also supports generic desktop functions, like drag and drop, pop-up windows, and so on through the utilization of the corresponding APIs (Application Programming Interface). The result is an efficient, modern and attractive client environment.

The main elements of SAP NWBC are as follows:

Shell:

The shell is the frame consisting of the horizontal bar above and the vertical bar to the left of the canvas. It provides a wide range of functions such as role-based navigation, search functions, help, desktop integration, menus, branding, scripting, caching and so on.

Canvas:

The canvas is the area that hosts the applications. It provides a unified environment with embedded rendering engines for the different types of applications.

All standard applications run in the NWBC canvas including the following:

- Web Dynpro for ABAP
- Web Dynpro for Java
- SAP GUI applications
- SAP NetWeaver Business Warehouse reports
- Adobe Forms

Employee Self-Service using SAP NetWeaver Business Client

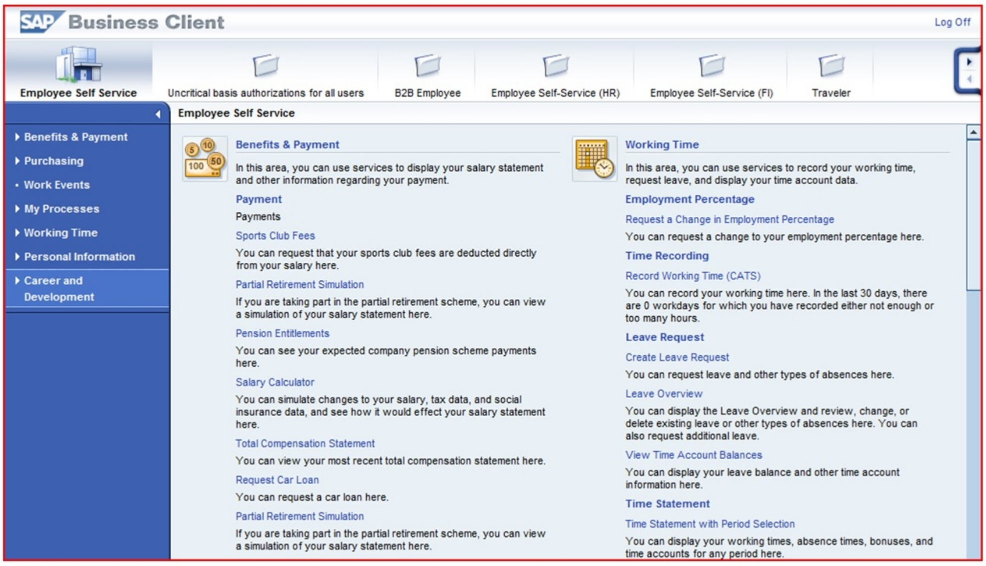


Figure 202: Employee Self Service using NWBC

The screen an employee would see when accessing Employee Self Services using NWBC is very similar to that of a portal.

The navigation section on the left hand side of the screen allows quick and easy access to various employee services. Alternatively, the employee may select the required service by clicking on the link in the canvas section of the screen on the right side.

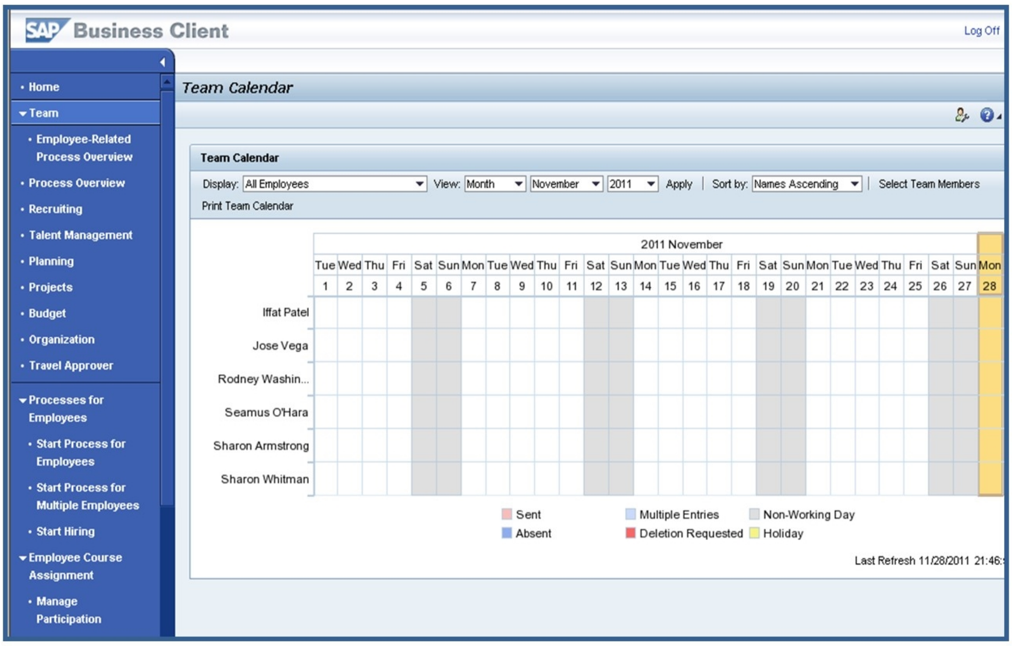


Figure 203: Manager's Self-Service with NWBC

The initial screen a manager would see when accessing NWBC is also very similar to the portal. The manager would select the required service from the navigation column on the left side of the screen. Details are presented in the canvas section.

LESSON SUMMARY

You should now be able to:

- List the advantages of self-services
- View a team calendar as a manager
- Update dependent information using SAP NWBC

Unit 10

Learning Assessment

1. What is an example of data that can be maintained by employees' via the Employee Self-Service system (ESS)?

   Choose the correct answers.

   - [ ] A A change of home address
   - [ ] B Benefits Enrollment
   - [ ] C View the company's Training Schedule

Learning Assessment - Answers

1. What is an example of data that can be maintained by employees' via the Employee Self-Service system (ESS)?

   Choose the correct answers.

   - [X] A A change of home address
   - [X] B Benefits Enrollment
   - [X] C View the company's Training Schedule

   Correct. All of these functions are possible through ESS. Some others include applying for internal positions, locating other employees via the Who's Who directory, and viewing and printing out one's pay stub.

UNIT 11 Analytics

Lesson 1

UNIT OBJECTIVES

- Execute an HCM standard report
- Create an ad hoc query
- Review a Business Intelligence dashboard

Analyzing HCM Reports

LESSON OVERVIEW

This lesson shows you how to execute Human Capital Management reports.

Business Example

As the Human Resources Reporting Analyst, you are responsible for generating reports for department managers. For this reason, you require the following knowledge:

- A good understanding of available reporting and analysis tools
- A good understanding of standard reporting processes

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Execute an HCM standard report
- Create an ad hoc query
- Review a Business Intelligence dashboard

Reporting in Human Capital Management

Reporting in Human Capital Management (HCM) helps personnel administrators record and evaluate the large volumes of data. The standard HCM system includes a large number of reports. These reports enable you to define search criteria to then create employee lists, view employee data or perform statistical evaluations. Reports can be exported to a local application format.

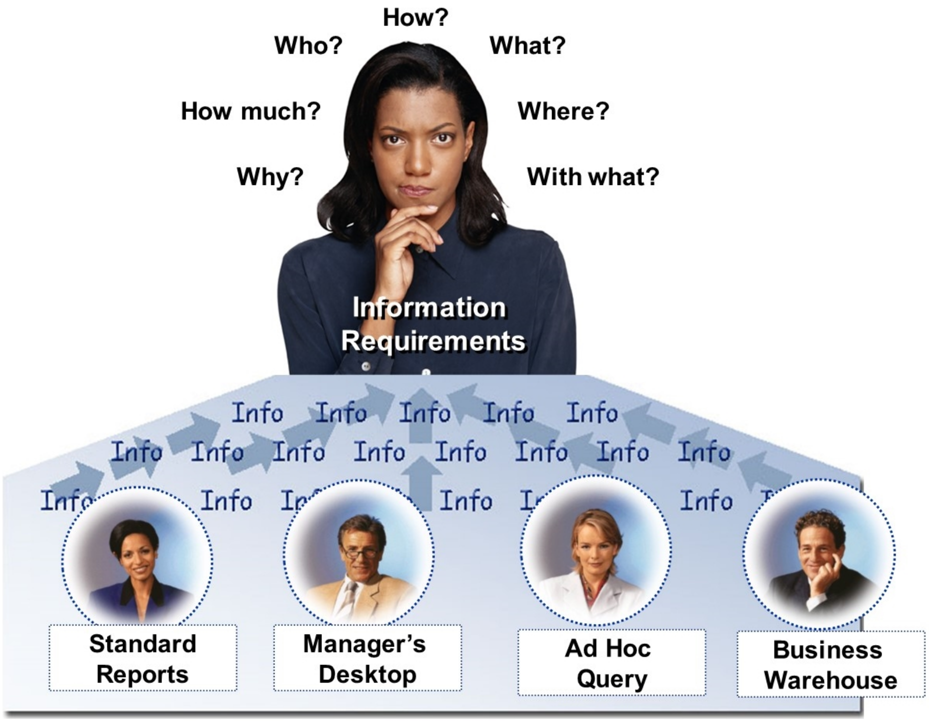


Figure 204: Reporting Overview

Reporting options available for HCM include the following:

Reporting Options	Description
Standard Reports	Access standard reports from the SAP Easy Access menu or by using general report selection.
Manager's Desktop	Manager's Desktop is a tool designed for managers to evaluate and report on data.
Ad Hoc Query	Use Ad Hoc Query, also known as InfoSet Query in other SAP system components, to create flexible reports.
SAP Business Warehouse	SAP Business Warehouse is an independent system in which reporting and analysis are performed. SAP Business Warehouse ships with business content, ready for reporting and analysis.

General Report Selection

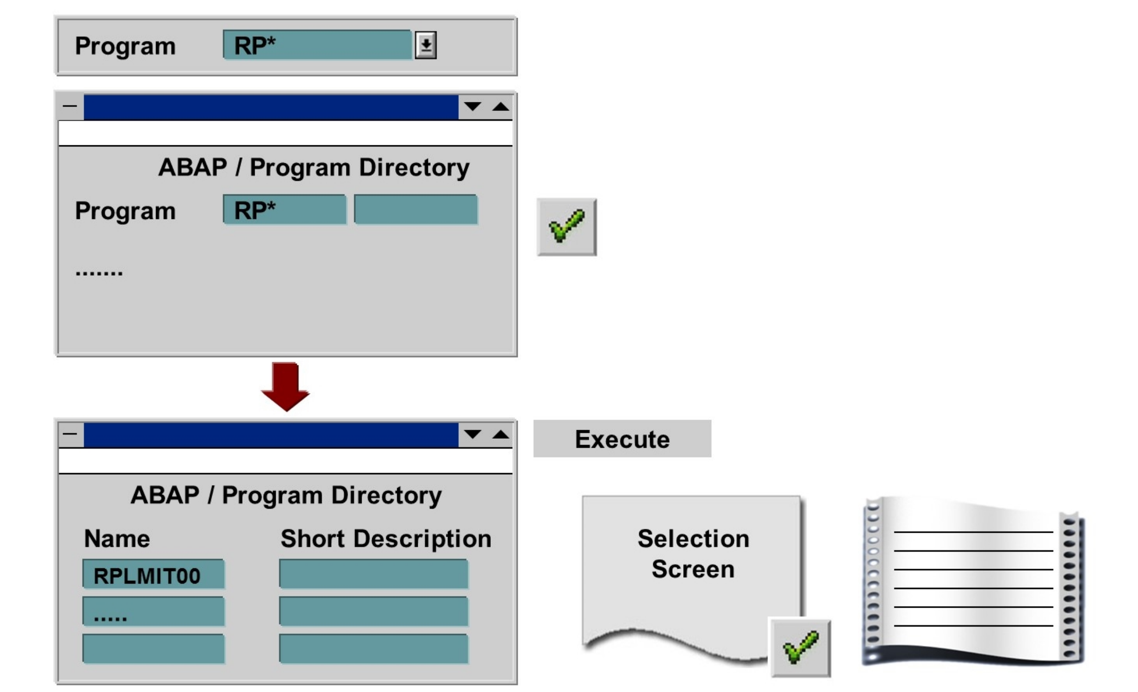


Figure 205: General Report Selection

Some reports cannot be accessed by using menu paths or general report selection. You can search for all reports using transaction code SA38 or navigating on the main menu bar of the SAP Easy Access screen by choosing: *System* → *Services* → *Reporting*.

On the initial screen, enter RP*, choose the button at the end of the report selection field to navigate to the ABAP Program Directory then select Execute. A list of reports in the program directory is displayed. You can initiate a search for various reports by using the Find icon.

You can find reports using the following entries in the ABAP Program Execution screen:

Entry in the ABAP Program Execution Field	Reports Displayed
RPL*	Lists
RPS*	Statistics
RPC*	Payroll Reports
RPU*	Utility Reports
RPT*	Time Management Reports
RPAPL*	Applicant Data Reports
RPI*	Reports for creating batch input sessions
RH*	Reports for personnel planning

Reports in the Information System

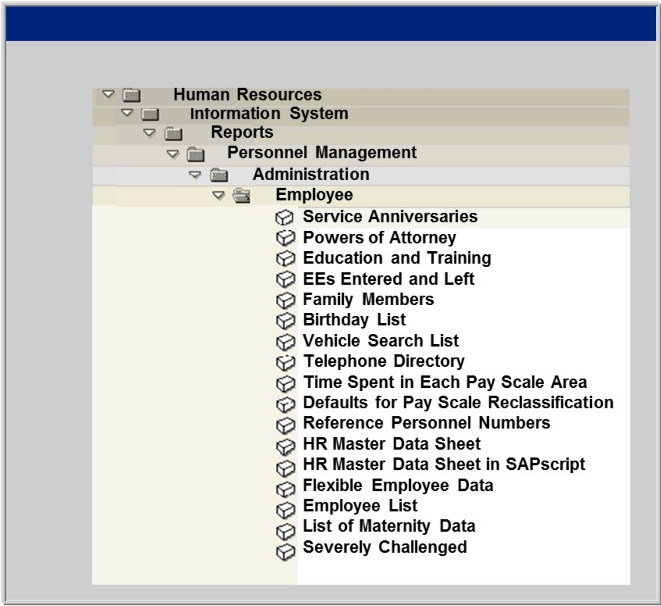


Figure 206: Information System Reports

A large number of standard reports can be started from the SAP Easy Access screen by navigating to the Information System folder. After the information system for human resources has been called, a standard report can be started or you can create a report with a tool such as Ad Hoc Query, SAP Query, or the Human Resources Information System. Reports that are created using the Ad Hoc Query or SAP Query can be saved and added to the standard report structure. You can change standard reports in customizing.

Before a specific report can be accessed, different hierarchy levels must exist in each component. Reports can be found at the lowest level of the information system from where you can execute them. For example, to view reports on personnel development, navigate the SAP Easy Access screen by choosing: *Human Resources → Personnel Management → Personnel Development → Information System → Reports. Under the Reports folder, various standard delivered reports are listed. When executing a report, you must complete a report selection screen.*

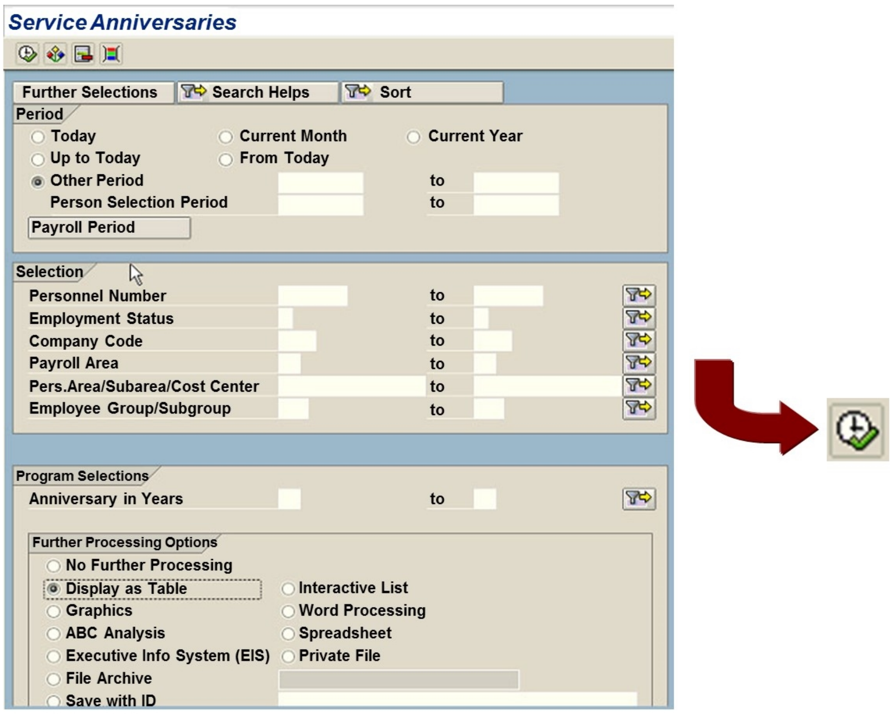


Figure 207: Report Selection Screen (Example)

The report selection screen contains a series of selection options that enable you to determine the criteria used to execute report. Each selection option has two fields, which you can use to specify a single value (by entering a minimum value in the first field only) or a value range (by entering a maximum value in the second field as well). By choosing specific selection options and values, you can determine the dataset to be read and the result of the report. The latter is derived from the evaluation of employee records and is output either as a list of employees, or as a numerical analysis of data on these employees.

To make generic entries, use *. To make masked entries, use +.

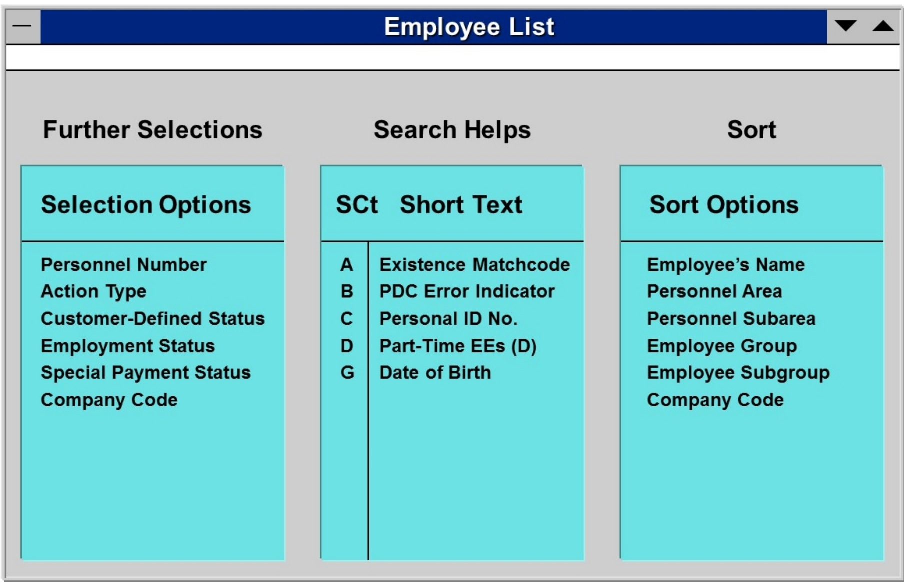


Figure 208: Enhancements to the Report Selection Screen

The report selection screen contains a series of default selection options that are used by the system to create a list of employees, for example, or a statistical evaluation. However, these defaults do not necessarily include all of the selection options that you require for your report run. The further selections function enables you to add selection options to the report selection screen, and delete existing selection options.

The match code function on the selection screen allows you to select the employees for which you want the report run. The sort function enables you to use up to seven criteria to sort the list of employees or employee data created by the report..

If you want to reuse selection values that you have set for a report, save them as a variant. Each time you call the variant, the system automatically writes its values to the individual selection fields.

Ad Hoc Query

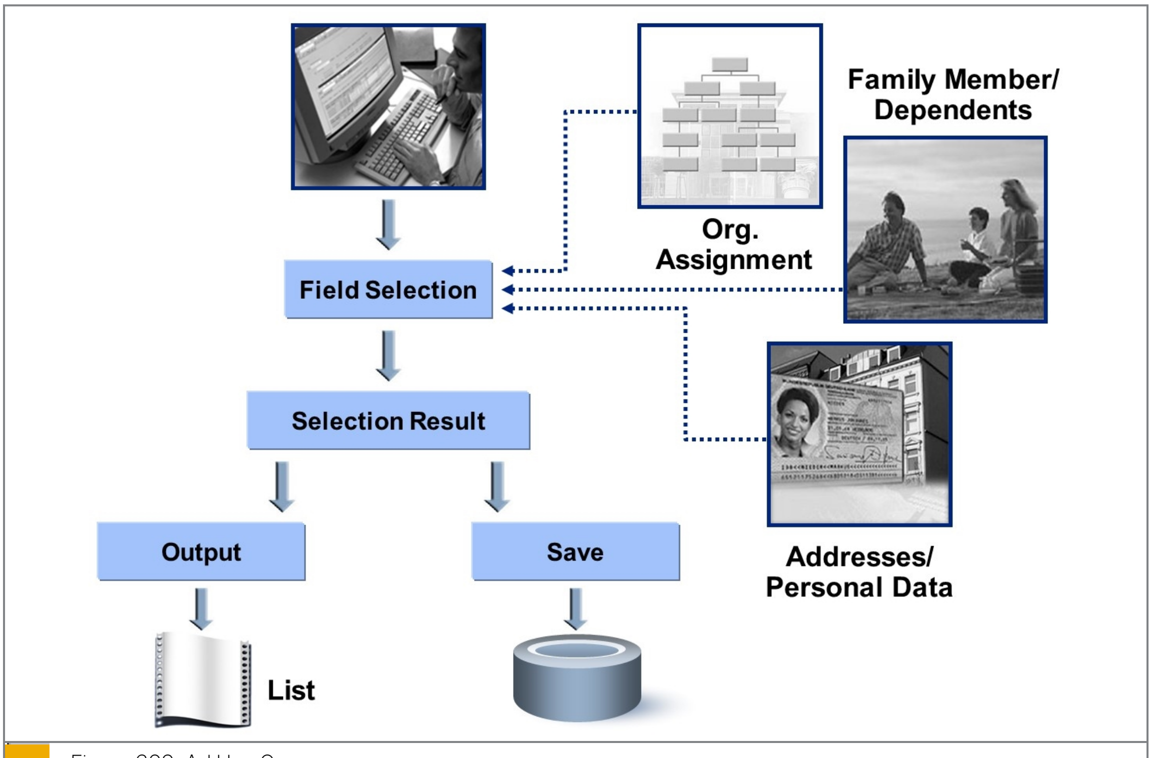


Figure 209: Ad Hoc Query

> Hint:
> Selection for objects meeting the stated criteria is made directly from the database which improves performance.

Ad Hoc Query is a simple but powerful tool for reporting on Human Resource data. It enables you to access data from all Human Resource areas by choosing selection and output fields. Programming skills are not required. Selection is made directly from the database for persons or objects which meet the criteria and selection and output fields are all on one screen. Accessing the database directly significantly improves performance.

Ad Hoc Query can be used for data stored in Recruiting, Master Data, Time Management, and Personnel Planning and Development (person-related data).

Note:
Standard authorization checks take place at the infotype and organizational assignment levels.

Ad Hoc Query: Functions

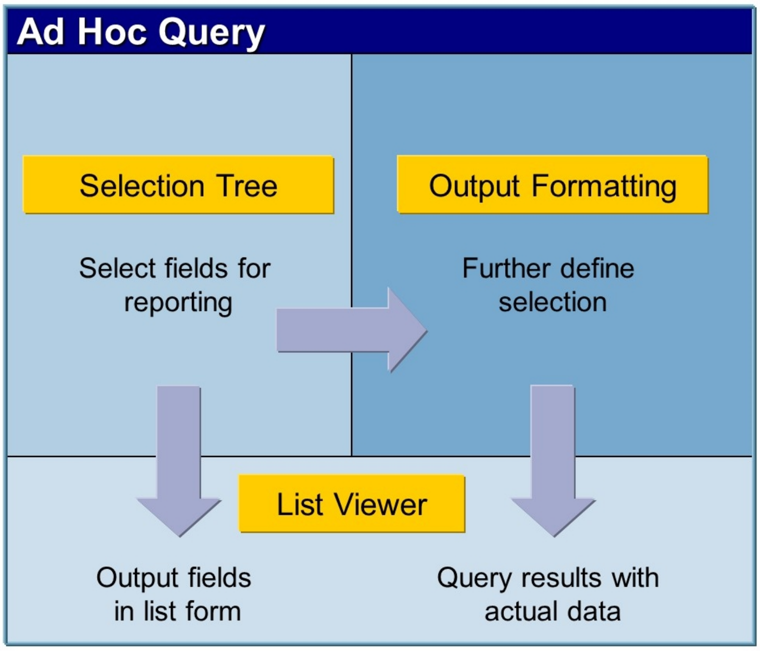


Figure 210: Ad Hoc Query Screen: All Functions

The Ad Hoc Query is based on infoSets and user groups which you specify within the query. InfoSets are assigned to user groups, which groups users, infotype fields and calculated fields together as required. InfoSets only display data that is required by the user which makes the program easy to operate.

Ad Hoc Query is based on Infosets, (groups of infotype fields and calculated fields), which are assigned to user groups. Users are assigned to user groups and can access assigned infosets to run queries. A query includes a hit list which enables you to further define values before the final output.Queries can be saved and reused.

Functions available with Ad Hoc Query include the following:

- One screen contains all functions:
  - field selection
  - selection criteria
  - output formatting
  - query results
  - interactive function of the SAP List Viewer (for example, export to Excel)
- Drag and drop for easy selection of selection and output fields

- Example data is replaced by real data in the output area
- Text, value, or both, (denoted by a T next to the field selection), is selected by using the right mouse button in the selection criteria and/or output criteria fields.
- Ad Hoc Query can be used to report on objects from Personnel Planning, provided the required infoset has been created.

Ad Hoc Query: Overview

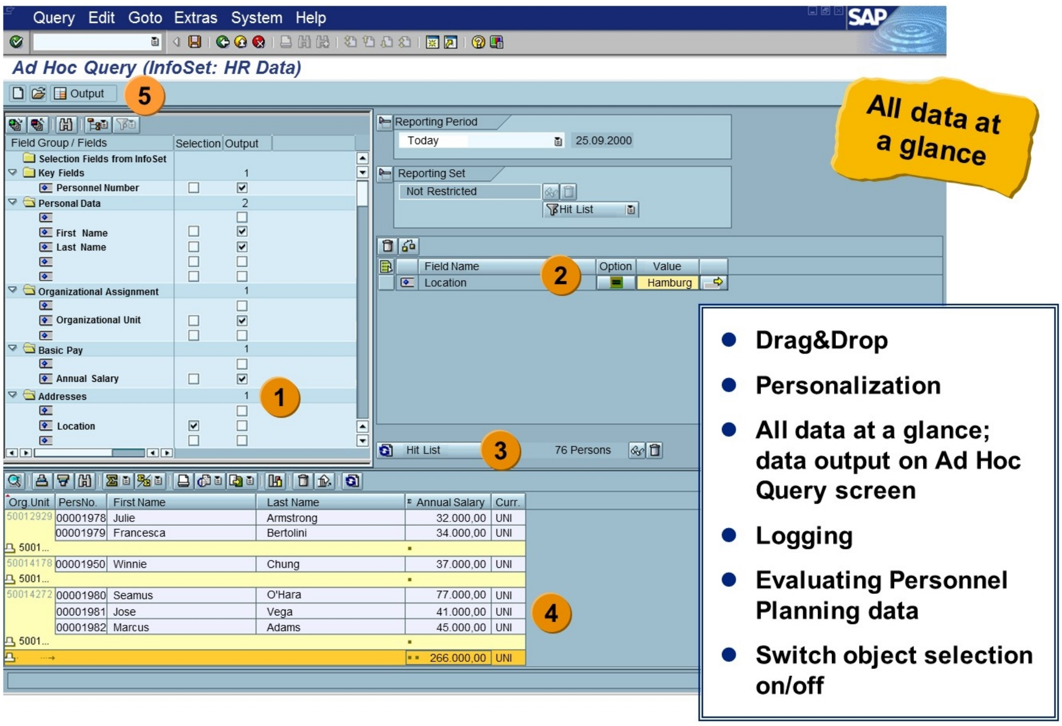


Figure 211: Ad Hoc Query: Overview

The output preview enables to you to see a display of your report layout before the data is actually output.

Output layout includes the following functionality:

- Sort the list according to one or more columns
- Cumulate numeric columns in basic lists and obtain subtotals
- Delete output fields not required
- Initialize formatting

The context menu determines whether additional columns (mean value, proportion in percentage, and total number) should be output for ranked lists and statistics.

The output format determines how data is displayed including list outputs and export functions such as spreadsheet. In this instance, the analysis is transferred in a file that you can further process using a spreadsheet program. You can export results to MS Word and MS Excel and further process the report results.

The send function enables you to forward the formatted report results to other users.

Your user settings are reloaded the next time you start Ad Hoc Query after exiting the query or when you log off the system.

Business Intelligence Dashboard Reports

SAP BI Reporting tools

The *SAP BI* Reporting tools are an optional set of reporting and analytics applications. They are licensed and used in the main by reporting authors to develop ad hoc reports for management or regular reports for others to consume in daily business operations. These reports can be distributed in many ways. They can be published to the *BI Platform* which is a reporting portal, included in portal roles such as Manager Self-service, stored locally or accessed on the *SAP BI Mobile* application. The applications in this suite are principally the former *Business Objects* reporting products. These applications do not contain delivered content. Report authors define this according to customer requirements. The content therefore can be on any subject matter. The data sources can be directed at SAP and non-SAP systems.

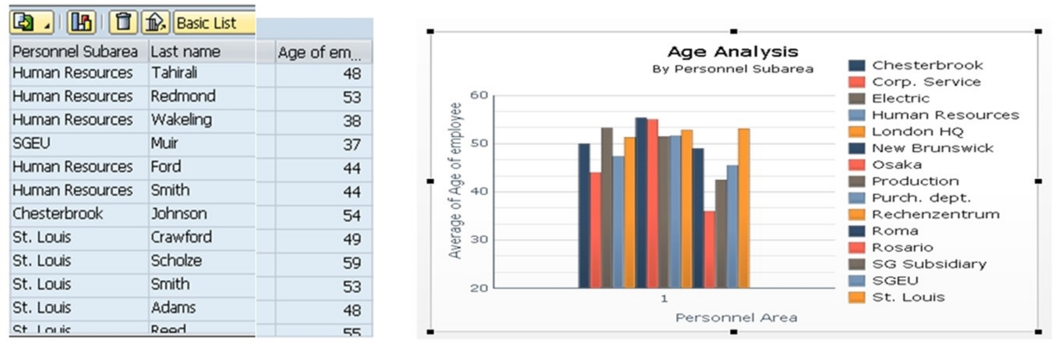
The applications include the following:

- *SAP BusinessObjects Dashboard Designer*
- *SAP BusinessObjects Design Studio*
- *SAP BusinessObjects Web Intelligence*
- SAP Crystal Reports
- *SAP Crystal Enterprise*
- *SAP BusinessObjects Analysis for Microsoft Office*
- *SAP BusinessObjects Analysis for OLAP*
- *Administration and Information Design/Universe Design*

SAP BusinessObjects, *Dashboard Designer*, and *SAP BusinessObjects Analysis* for OLAP have been used to develop some of the predefined reporting and analytics offerings found in the standard and optional On Premise offerings.

Customers using analysis tools from *SAP NetWeaver Business Warehouse* may decide to move to the BI suite of tools because these are the ‘premium replacement solutions’ for the BW analysis and design tools in the *Bex* or *Business Explorer*. The latest releases of the BI tools are able to use a growing variety of data sources including Universes, BW queries and *HANA* views.

Contrasting Traditional HCM Report Output with a Dashboard



Personnel Subarea	Last name	Age of em...
Human Resources	Tahirali	48
Human Resources	Redmond	53
Human Resources	Wakeling	38
SGEU	Muir	37
Human Resources	Ford	44
Human Resources	Smith	44
Chesterbrook	Johnson	54
St. Louis	Crawford	49
St. Louis	Scholze	59
St. Louis	Smith	53
St. Louis	Adams	48
St. Louis	Reed	55

Figure 212: Contrasting Traditional HCM Report Output with a Dashboard

Standard reports and even reports from Ad Hoc queries generally contain few numbers. Numbers that are present are not measurements but facts such as wage types, age of Employee, and so on.

Business Information is all about numbers or measures, reported or plotted against key data such as Employee Subgroup, Personnel area, Cost Center, etc. The data sources used by BI tools have translated many rows of data at an employee level into numbers of employees against key fields. The numbers can be a sum or ‘How many employees, but could also be a different aggregate, such as an average in the case of ages of employees. This is Analytic or Multidimensional reporting as opposed to flat or line by line reporting that you find in ALV type output. Once you have this type of analytic data you can build reports that allow the user to change the emphasis of the data and to interact with the report. The numeric content supports visualizations in the form of charts, graphs, crosstabs etc.

Example of a Dashboard

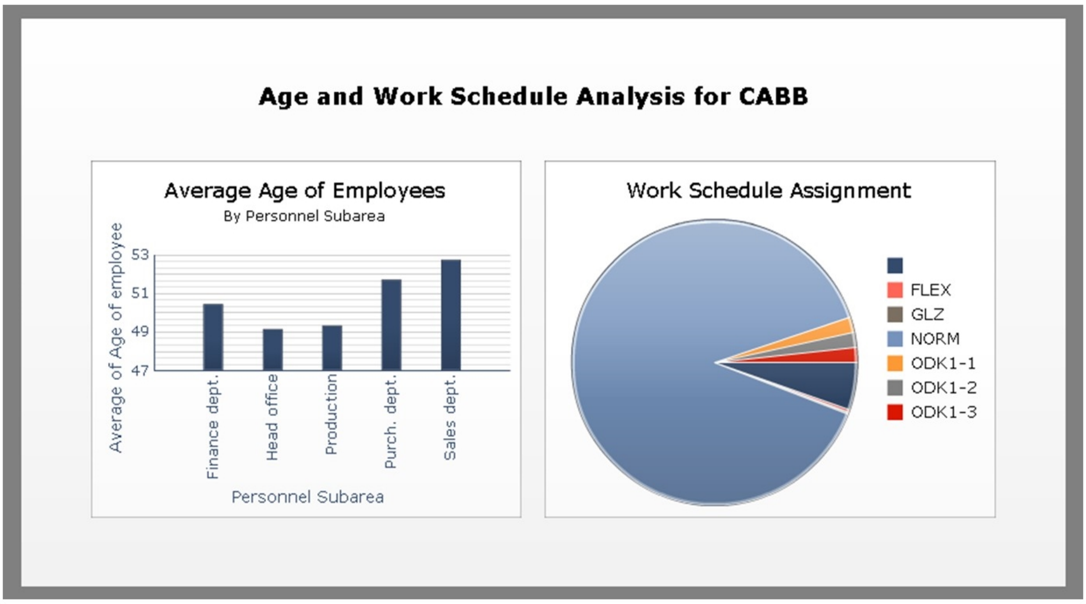


Figure 213: Example of a Dashboard

LESSON SUMMARY

You should now be able to:

- Execute an HCM standard report
- Create an ad hoc query
- Review a Business Intelligence dashboard

Learning Assessment

1. SAP does not deliver any standard reports or queries, these have to be created by the customer.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

2. Ad Hoc Query requires programming knowledge.

   Determine whether this statement is true or false.

   - [ ] True
   - [ ] False

Learning Assessment - Answers

1. SAP does not deliver any standard reports or queries, these have to be created by the customer.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

   Correct. SAP delivers standard reports and standard queries. These can be changed during programming. New reports can be created using Tools such as Ad Hoc Query and SAP Query even without any programming experience.

2. Ad Hoc Query requires programming knowledge.

   Determine whether this statement is true or false.

   - [ ] True
   - [x] False

   Correct. Ad Hoc Queries are created on one screen and programming knowledge is not required.

UNIT 12 SAP SuccessFactors: Introduction and Modules

UNIT OBJECTIVES

- List and describe SAP SuccessFactors solutions
- Explain on High Level the Integration of SAP HCM and SAP SuccessFactors

Unit 12
Lesson 1

Introduction to SAP SuccessFactors

LESSON OVERVIEW

This lesson provides an overview of SAP SuccessFactors integration with SAP HCM.

Business Example

As a member of the HCM strategy team, you are responsible for investigating SAP SuccessFactors integration with SAP HCM. You require the following information:

- An understanding of SuccessFactors solutions
- Integration options

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- List and describe SAP SuccessFactors solutions

SAP SuccessFactors Overview

What is SAP SuccessFactors?

Figure 214: HXM Suite Overview

SAP and SAP SuccessFactors create a full service set of cloud and on-premise solutions for Human Capital Management. Now we tend to speak about HXM: Human eXperience Management.

SAP uccessFactors, founded in 2001 and acquired by SAP in 2012, is the leading cloud-based HXM Software Suite with comprehensive, integrated mobile solutions.

Data Centers located globally store and manage all performance data, which allows customers to quickly access information, minimize maintenance costs, and easily upgrade software during our releases.

Instance and Provisioning

What is the instance?

- The Instance is the Front End system that the customer uses on a daily basis.
- Only certain users at the customer site will have access to Admin Center in the instance, but all other users will have access to the various products the customer has purchased.
- Some parts of the configuration can be changed from the instance, we want our customers to be as autonomous as possible.
- Other parts of the configuration can only be changed from the back-end, provisioning.
- Customers do not have access to provisioning. They work with their implementation consultant during the implementation project or with the support team when needed.

Platform Overview

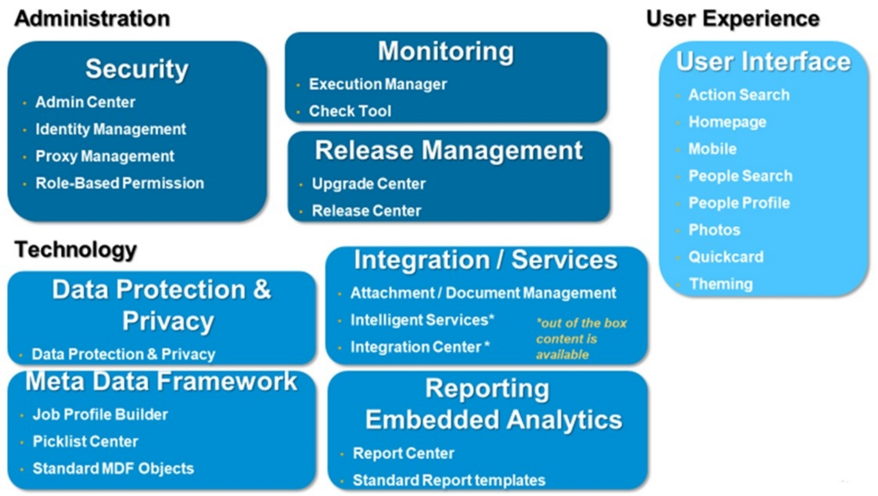


Figure 215: Platform Overview: Administration, Technology, and User Experience

The SAP SuccessFactors Platform is the building block of our application suite.

Platform capabilities are grouped under 3 main areas: administration, technology, and user experience. These essential platform capabilities are not module specific but can support the operation of one or multiple modules.

Fundamental platform aspects are covered in great details in THR80 and in HR800, such as Role-Based Permissions, Home Page or the Theme Manager for example; THR98 for Advanced Platform Topics.

SAP SuccessFactors Recruiting

Overview of Recruiting Management

- SAP SuccessFactors Recruiting Management helps build a workforce that will aid in growing your business.
- SAP SuccessFactors Recruiting Management enables for the following:
  - Provide a multi-channel approach that places job opportunities in front of the right candidates.
  - Initiate relationships and maintain contact with candidates.
  - Initiate relationships and maintain contact with candidates.

Figure 216: Key Areas of Recruiting

Key areas of SAP SuccessFactors Recruiting include the following: Recruiting Posting, SAP SuccessFactors Recruiting: Candidate Experience, and SAP SuccessFactors Recruiting: Recruiter Experience.

Key Area	Description
Recruiting Posting	It allows you to post jobs to the desired sources and analyze performance, in real time, to optimize sourcing budget and candidate flow.
SAP SuccessFactors Recruiting: Candidate Experience	It focuses on attracting and engaging candidates through the use of a customized career site. This shows customers which marketing strategies result in the best candidates at the lowest cost.
SAP SuccessFactors Recruiting: Recruiter Experience	It provides an Applicant Tracking System (ATS) to support sourcing capability of SAP SuccessFactors Recruiting: Candidate Experience. SAP SuccessFactors Recruiting: Recruiter Experience supports opening requisitions, processing candidate applications, and selecting the best candidate for a position.

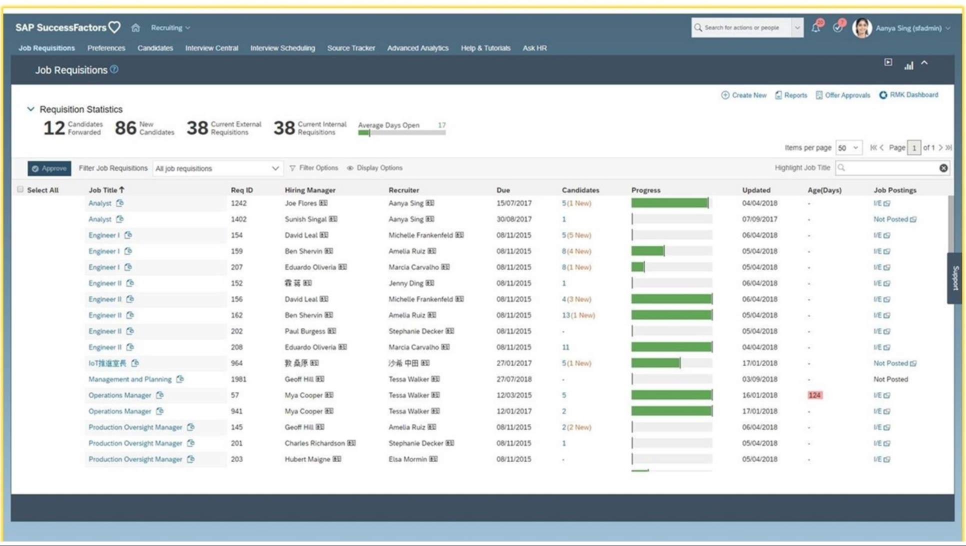


Figure 217: Job Requisitions Page

SAP SuccessFactors Onboarding

Overview

SAP SuccessFactors Onboarding provides the tools to ensure retention, engagement, and productivity not only with hiring new employees, but with every other step of the employee life cycle, from new hires entering the company to employees moving to new roles to employees moving on outside of the organization. There are three ways SAP SuccessFactors Onboarding can help create the ideal onboarding solution:

1. People:

   Connecting new hires with the right people and relevant content even before their first day.

2. Process:Including all constituents (new hire, hiring manager, HR, IT, etc.) through key onboarding activities.

3. Productivity:Ramp up new hires rapidly, enabling them to contribute quickly.

Onboarding Process

The typical new hire process requires a new employee to complete and sign paperwork including national, regional/local, and corporate forms. In addition, internal and external resources must be notified to perform tasks to complete the new hire process. The onboarding process includes the following steps:

1. Post hire verification
2. New employee setup
3. Orientation step; U.S. only

> Note:
> This is the standard out-of-the box process. The actual process can vary depending on your organization’s configuration.

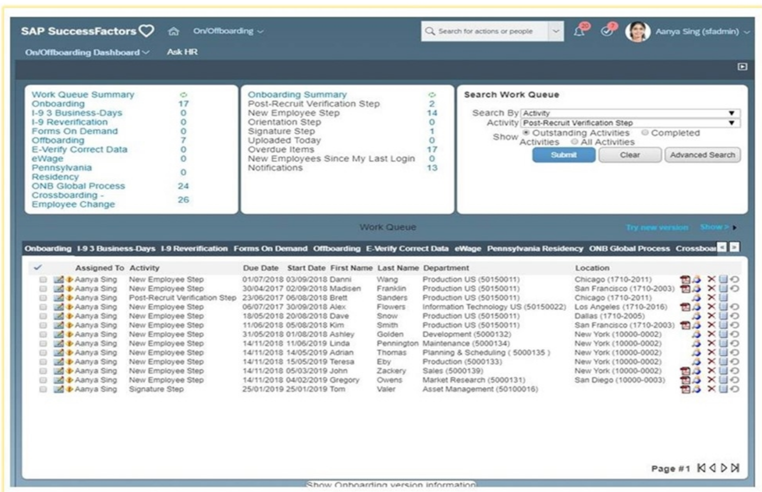


Figure 218: Onboarding Dashboard

SAP SuccessFactors Employee Central

Overview

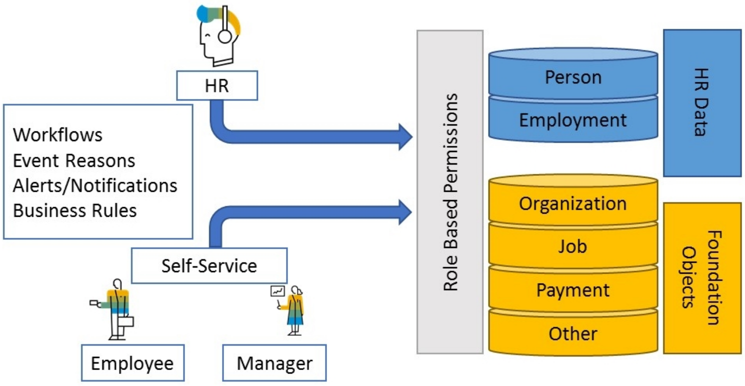


Figure 219: SAP SuccessFactord Employee Central Overview

Employee Central is a cloud-based HR solution with the following functions:

- Store HR records for all employees and company's organization and job structure
- Keep transaction records and corrections history
- Support self-service tools to empower employees and managers
- Store information can be utilized by SF Talent management modules
- Provide available add-on features such as Global Benefits, Payroll, and Time Management

Key Areas of Employee Management

Employee Central Data

Employee Central Data belongs to one of the following three categories:

1. Personal data:

   Personal Data is employee data that is independent of employment, such as date of birth, nationality, and so on.

2. Employment data:

   Employment data is data about an employee that is connected to their employment, such as job code, job title, and so on.

3. Foundation Objects (Foundation Data):

   This is used to set up data that can be shared across the entire company, such as job codes, departments, or business units. Foundation objects are sometimes referred to as "foundation tables".

   - You can use Foundation Objects to populate data at the employee level. For example, if you assign a job code to an employee, that employee's record is then populated with all information based on the attributes of the job code.
   - The relationships that are configured between the Foundation Objects can be used to filter the lists of values in Employment Information. For example, the list of pay

components that are selectable on an employee's record can be filtered based on the country that the employee is associated with as determined by the employee's legal entity.

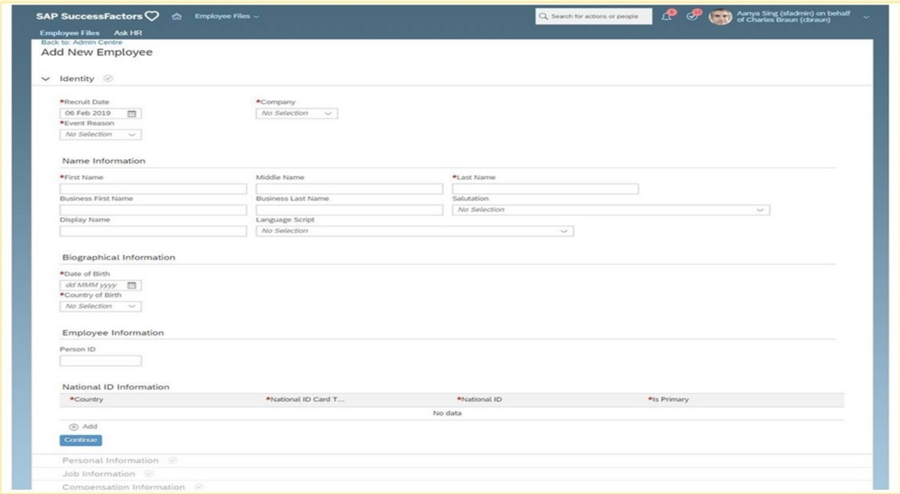


Figure 220: Add New Employee

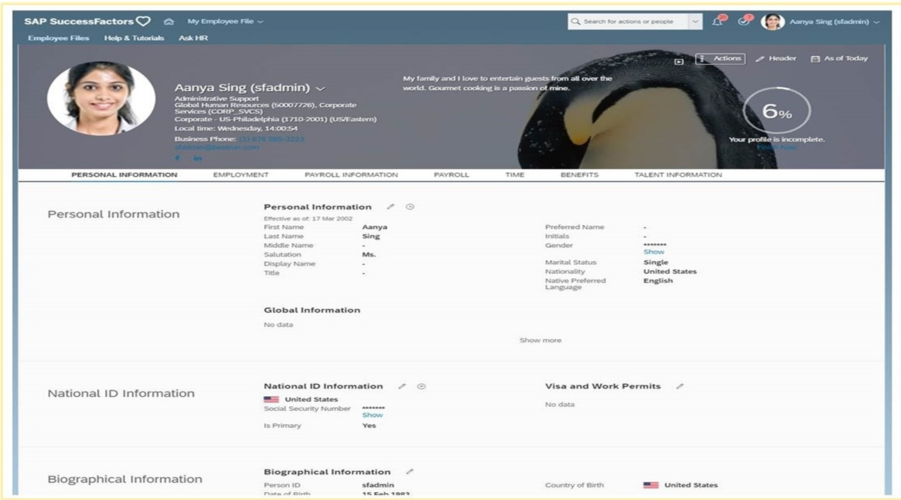


Figure 221: Personal Information Page

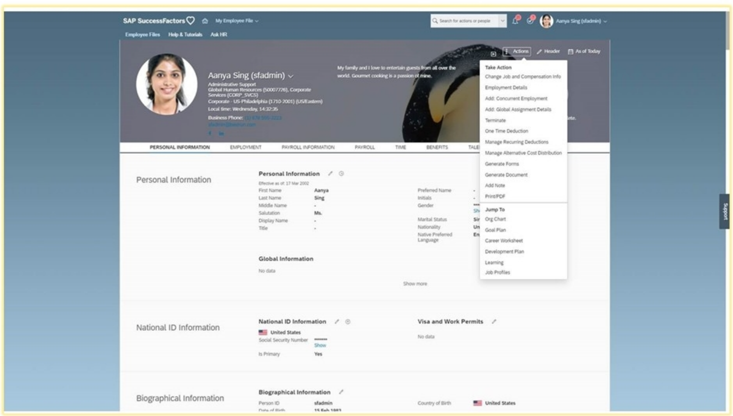


Figure 222: Employment Information Page

SAP SuccessFactors Performance and Goals (PMGM)

Different Modules of PMGM

Goal Management allows users and managers to set and meet goals on personal level, or on a company-wide basis. Performance management allows managers and users to review an employee’s goals and competencies. It aligns the objectives of the organization with the employees' agreed measures, skills, competency requirements, development plans. This provides the delivery of results through the automation of talent management processes.

PMGM includes the following:

- Goal Management
- Performance Management
- Continuous Performance Management
- Calibration
- 360 Reviews

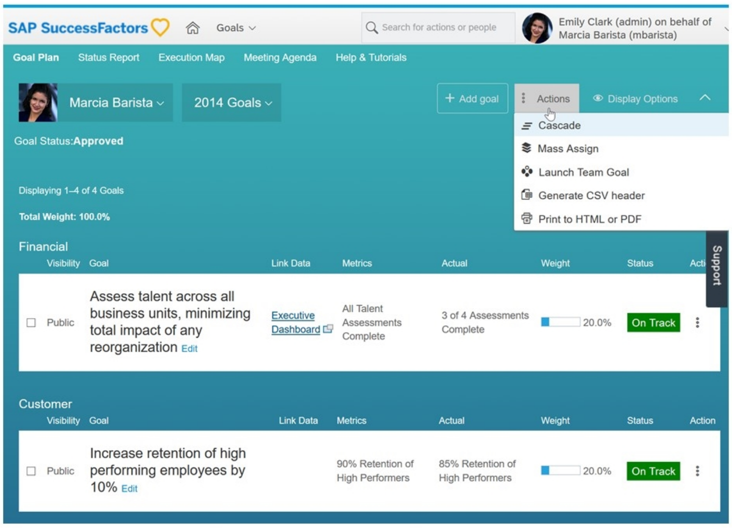


Figure 223: Goa Management

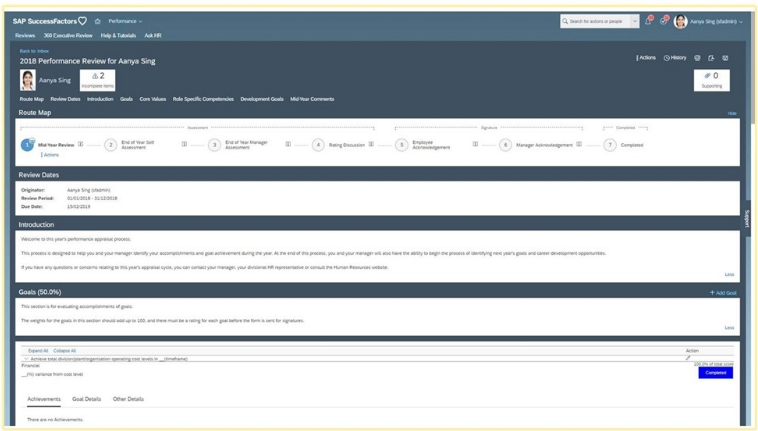


Figure 224: Performance Management

SAP SuccessFactors Learning Management

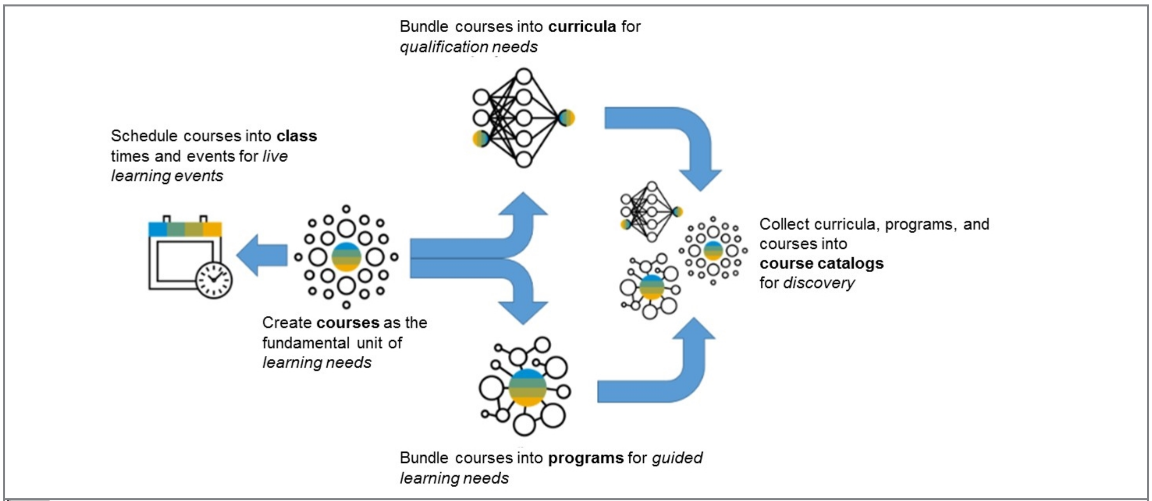


Figure 225: What is a Learning Management System?

SAP SuccessFactors Learning Management combines formal, social, and extended learning with unmatched content management, reporting, analytics, and mobile abilities. The result is learning that transforms the business and provides verifiable return on investment (ROI).

SAP SuccessFactors Learning Management enables you to perform the following:

- Manage learning more efficiently: House learning activities in a single location to reduce costs and create greater visibility.
- Improve compliance reporting: Use the Learning Management System (LMS) to track, train, and automate required certification assignments.
- Blend formal and social learning for greater ROI: Accelerate performance and increase learning retention by seamlessly using SAP Jam as part of learning processes.
- Extend learning easily: Train your partners and customers with an Extended Enterprise solution that includes e-commerce functions.
- Make administration more powerful and intuitive: Wizard-based processes and assignment profiles provide unparalleled automation for your administrators.
- Improve content delivery: Reduce costs, increase efficiency, and assure that e-learning exceeds business results with a unique iContent service.

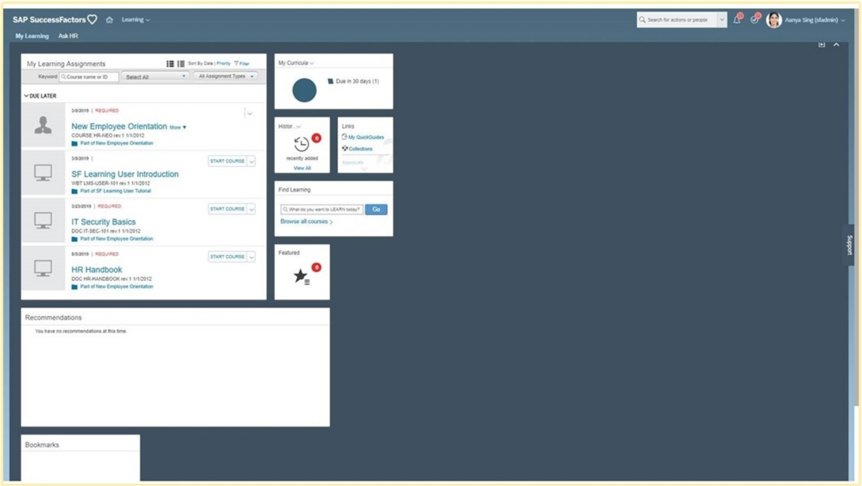


Figure 226: LMS Home Page

The user side layout is a landing page with configurable tiles. These tiles can include the following:

Topic	Description
My Learning Assignments	This tile displays items, curricula, requirements, surveys, and programs assigned to the user.
My Curricula	This tile displays a pie-chart status of items within assigned curricula.
Learning History	This tile displays events recorded in the last 30 days.
Find Learning	This tile allows the user to search and browse the catalog.
Featured	Items that were flagged as New, Featured, or Revised appear here.

SAP SuccessFactors Career Development Planning and Mentoring (CDP)

Career Development Planning (CDP) offers employees the opportunity to engage in career goals, competencies, future roles, paths, or mentoring. Utilizing such tools, managers or human resources can easily note an employee’s future ambitions. CDP includes the following:

- Development Plan
- Career Worksheet
- Career Path
- Mentoring

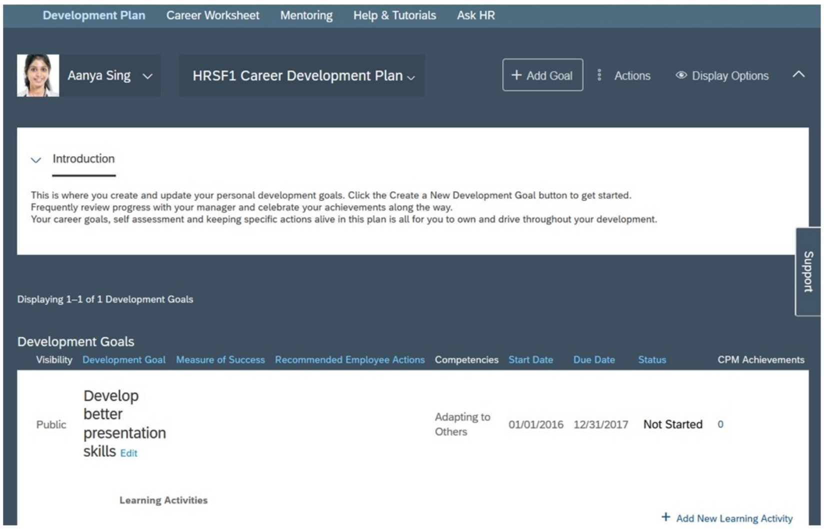


Figure 227: Development Plan

The Development Plan is the page where Employees and Managers can add, view, and update their development goals.

These are the goals that users have set to help them not only develop in their current roles, but also develop for future positions.

Development goals can be composed of several fields. The most frequently used are as follows:

- Name
- Measure of success
- Status
- Start and due date
- Competencies

SAP SuccessFactors Succession Management

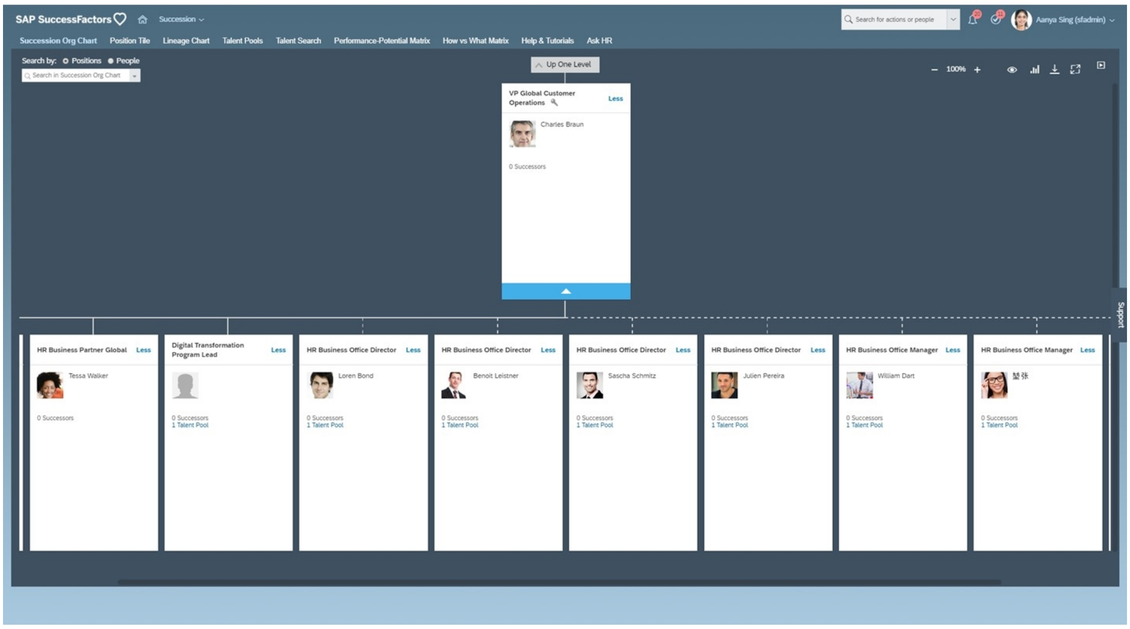


Figure 228: Succession Org Chart

SAP SuccessFactors Succession Management enables organizations to retain their talent, identify talent gaps, and create succession plans by nominating employees to positions aligned with expertise and career aspirations. As turnover or natural attrition occurs, successors are identified via the *Add Successors* feature to quickly fill key positions and decrease any stress involved in replacement staffing.

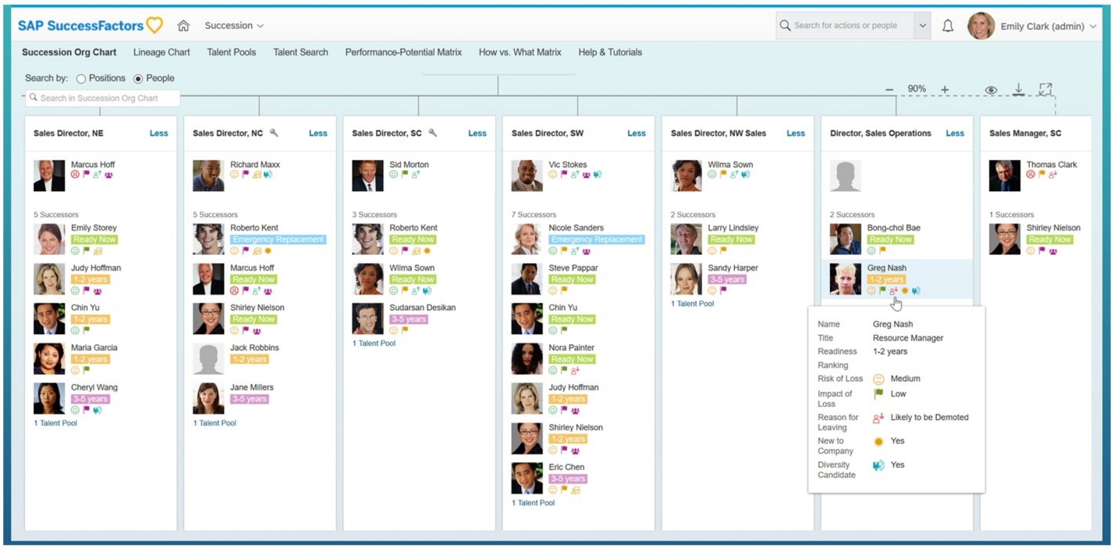


Figure 229: Succession Org Chart

Common succession management goals include the following:

- Identifying candidates for key positions
- Improving accuracy of staffing decisions

- Filling positions rapidly
- Accelerating employee development
- Increasing employee engagement
- Retaining or promoting key talent
- Collaborating across functions and families
- Creating talent pools

SAP SuccessFactors Compensation

Compensation Management

What is Covered?

- Compensation module (Salary and LTI)
- Rewards and Recognition (spot awards)
- Varialble Pay module (bonus)

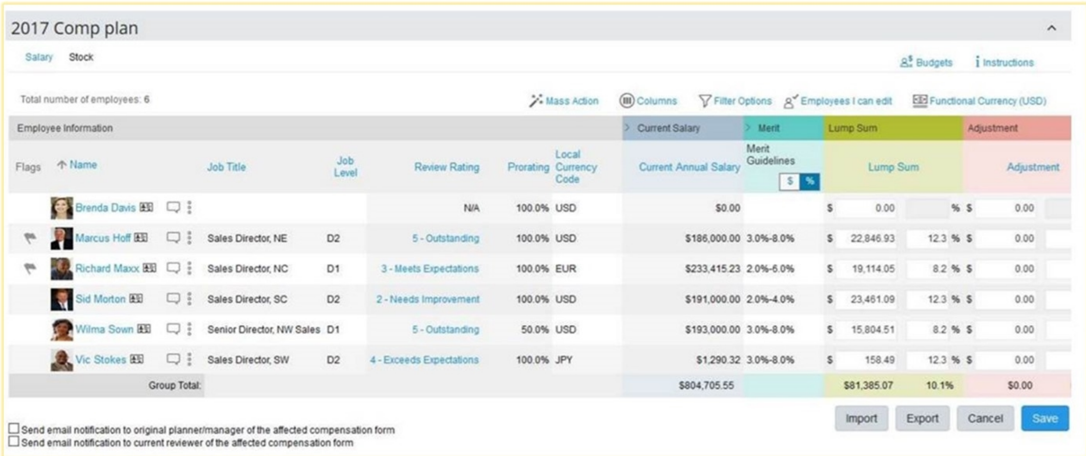


Figure 230: Executive Review

Users with Executive Review privileges can review compensation recommendations across their areas of responsibility and down the hierarchy without having to open individual forms.

- In this way, they can have knowledge of the compensation planning but not necessarily have to be part of the route map approval process.

Managers can use Executive Review to ensure equity among employees and teams and to review budget allocations.

The Compensation tool provides managers with relevant information for making planning decisions on salary, promotions, equity and stock adjustments according to individual, group, or company-wide guidelines. The Compensation tool can be used with Performance Management to effectively link job performance with compensation awards. Automated merit increases based on guideline calculations such as job level, pay grade, performance rating, compa-ratio, and range penetration can be implemented.

SAP SuccessFactors People Analytics

Self Service Reporting Tools

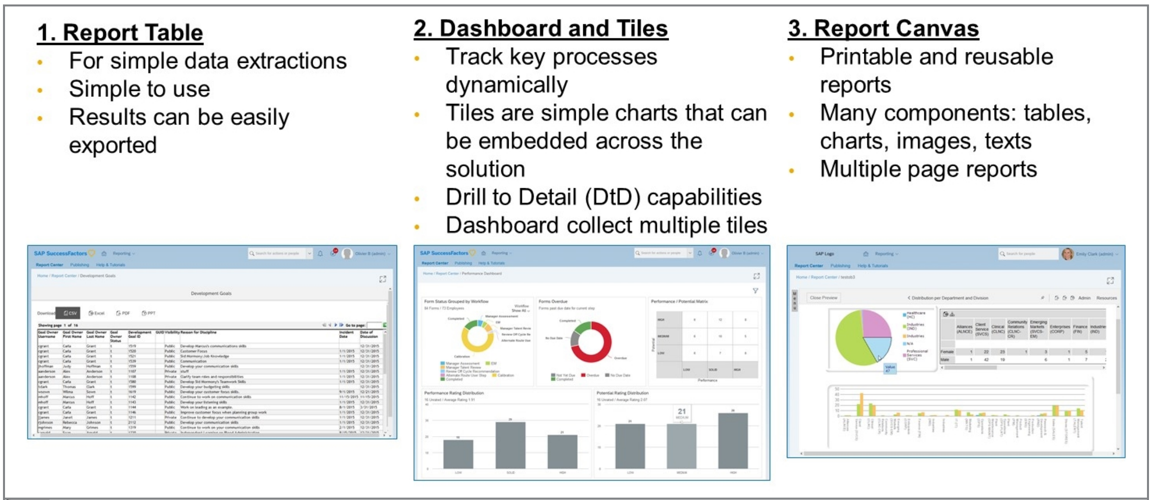


Figure 231: Self Service Reporting Tools

Reports in SAP SuccessFactors People Analytics have the following characteristics:

- Allow for simple data extractions
- Simple to use
- Results can be easily exported

SAP SuccessFactors People Analytics supports reporting with the following options:

- Dashboards and tiles
- Report canvas
- Story reports

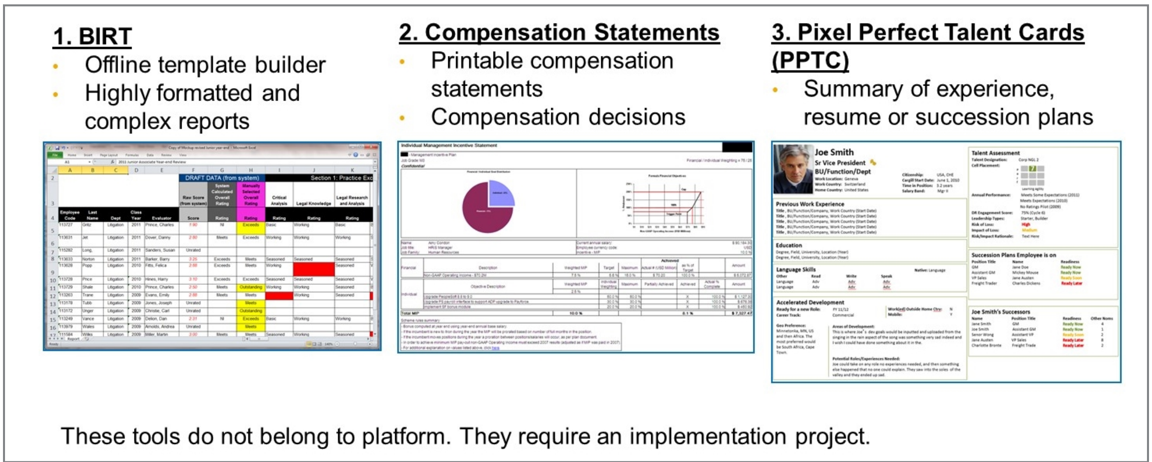


Figure 232: Custom Reporting Tools

Custom reporting tools, listed here:

- BIRT
- Compensation statements
- Pixel Perfect Talent Cards (PPTC)

LESSON SUMMARY

You should now be able to:

- List and describe SAP SuccessFactors solutions

Unit 12
Lesson 2

Integrating SAP HCM and SAP SuccessFactors

LESSON OVERVIEW

LESSON OBJECTIVES

After completing this lesson, you will be able to:

- Explain on High Level the Integration of SAP HCM and SAP SuccessFactors

Cloud Deployment Scenarios for SAP Customers

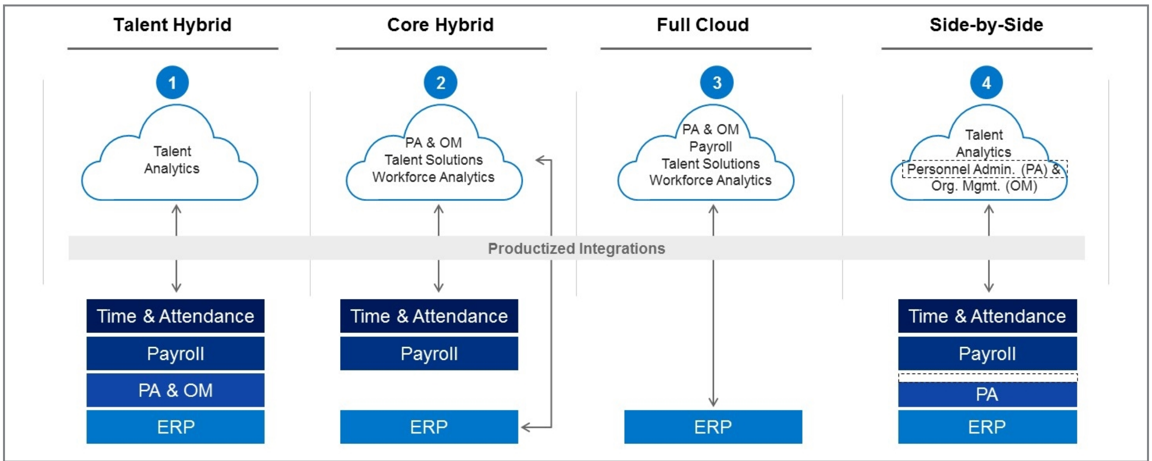


Figure 233: SAP SuccessFactors: Cloud deployment Options for SAP Customers / Scenarios

> Note:
> These scenarios are valid for SAP S/4HANA (on premise) and SAP ERP customers.

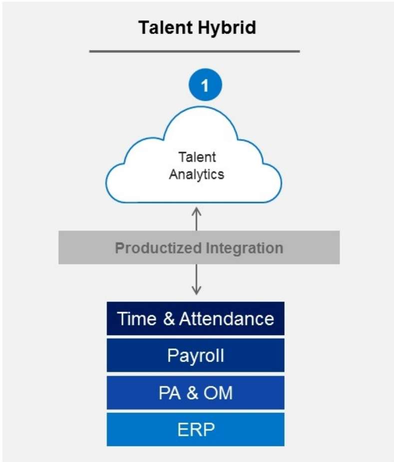


Figure 234: "Talent Hybrid" Scenario: No Data Migration Needed

- Employee and org data is still mastered in SAP ERP HCM on premise
- No data migration is needed

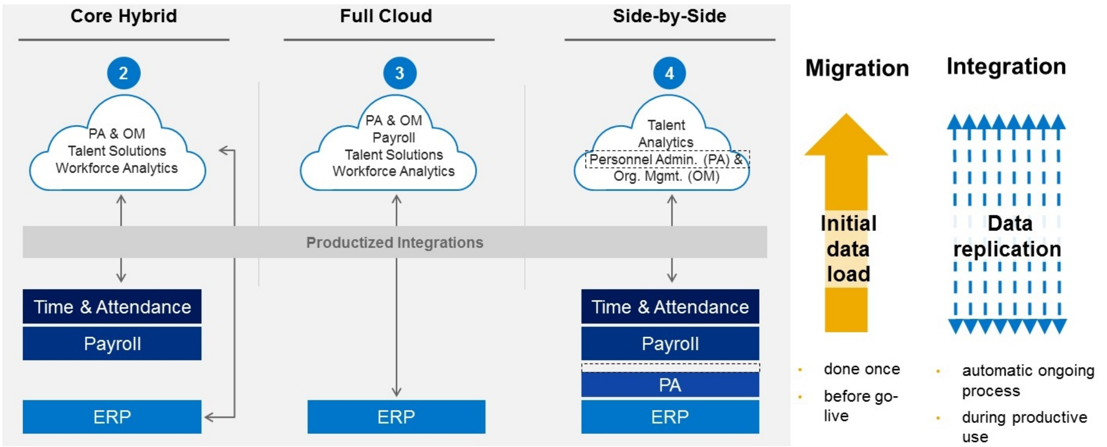


Figure 235: Cloud Deployment Scenarios for SAP Customers

Note:
These scenarios are valid for SAP S/4HANA (on premise) and SAP ERP customers.

LESSON SUMMARY

You should now be able to:

- Explain on High Level the Integration of SAP HCM and SAP SuccessFactors